Last Updated: 11/13/2020

MO ACTS Release Notes

NEW SYSTEM FUNCTIONALITY
VOLUME 2 - RELEASE 4.0, 5.0 & 6.0

MO ACTS
Missouri's Advanced Contact Tracing System

Release Notes

Missouri's Contact Tracing Platform

This document includes important information about new MO ACTS functionality and system enhancements from each build release. Use this guide to understand the step by step processes about adjustments, improvements and changes within the MO ACTS platform.

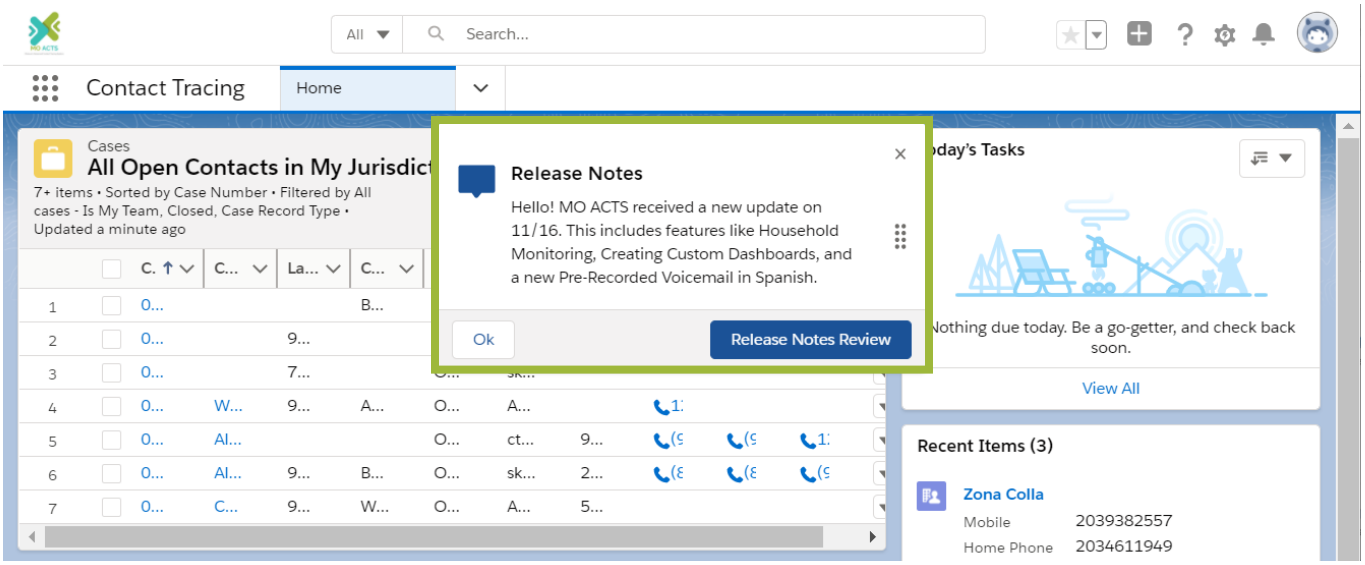
Section (click for details)	Description	As of Date / System Release
MO ACTS In App Prompts	In App Prompts will direct users through a URL link to the latest Release Notes document on the MO ACTS Intranet Site and other important announcements for MO ACTS users.	11/16/20 Version 6.0
MO ACTS Submitting a Guided script for Multiple Household Members	In this section you will learn about how Contact Tracers can complete a guided call script for multiple contacts in a household when conducting outreach calls.	11/16/20 Version 6.0
MO ACTS English and Spanish Prerecorded Voicemail	Contact Tracers can now leave a contact a pre-recorded voicemail in either English or Spanish.	11/16/20 Version 6.0
MO ACTS Quarantine Period Length	There is a new field for total Number of Quarantine Days that is editable and will dynamically impact the Quarantine End Date field.	11/16/20 Version 6.0
MO ACTS New County Field on the Case and Account records	MO ACTS users can now find the County field on both the Contact Details and the Person Record. These fields will sync between the account/contact record and the case record.	11/16/20 Version 6.0
MO ACTS Automatic Case Monitoring	In this section you will learn how cases can be monitored by using MO ACTS to automatically send SMS messages to contacts in order to efficiently track their symptoms if/as they arise for themselves and/or household contacts.	11/16/20 Version 6.0
MO ACTS Inbound Call Routing and Voicemail	In this section you will learn about the updates to inbound call routing and the new ability for contacts to leave voicemails when calling MO ACTS.	11/16/20 Version 6.0
MO ACTS Amazon Connect Reporting	Contact Tracers can now view reporting metrics from the Amazon Connect Softphone. This includes reports such as average handle time for contacts, abandon rates, agent performance, and more.	11/16/20 Version 6.0
MO ACTS Custom Dashboards	In addition to the pre-built dashboard functionality within MO ACTS, Contact Tracers can now create their own personal dashboards so they can work with the selected reports side-by-side using them as components on a single page layout.	11/16/20 Version 6.0

MO ACTS Household Management	In this section we will show you how to view if a contact is part of a household (e.g. resides in the same living space with other contacts) and view additional details that can help inform your contact tracing activities.	10/26/20 Version 5.0
MO ACTS System UI Enhancements	Learn about various User Interface (UI) enhancements, including enhancements to picklists, and a new field for Unit Number.	10/26/20 Version 5.0
MO ACTS Automatic Case Monitoring	*Functionality has been updated in the newest release.*	*10/26/20 Version 5.0*
MO ACTS Resource Coordination	In this section you will learn about new functionality around resource coordination in MO ACTS. How to assign a resource coordinator, how to view all contacts requiring resource coordination, and how to view cases assigned to you.	10/26/20 Version 5.0
MO ACTS Amazon Connect Updates	In this section you will learn about additional features and functionality that have been added to the Amazon Connect phone system within MO ACTS.	10/26/20 Version 5.0
MO ACTS Inbound Call Routing and Voicemail	*Functionality has been updated in the newest release.*	*10/26/20 Version 5.0*
MO ACTS Jurisdiction Ad Hoc Access	In this section, you will learn about how contact tracers are now able to be added to multiple jurisdiction groups and have the ability to see case records for each group.	10/05/20 Version 4.0
MO ACTS Bulk Contact Case Actions	Learn how to close cases and how to reassign ownership of cases in bulk.	10/05/20 Version 4.0
MO ACTS Case, Contact, and Account Page Layouts	Lean about how these pages are updated for clarity and are more intuitive to read.	10/05/20 Version 4.0
MO ACTS Route to Queue Based on EpiTrax Investigation Agency	In this section you will learn how in the absence of a county listed in EpiTrax, cases will be routed to an LPHA queue through the EpiTrax Investigation Agency.	10/05/20 Version 4.0
MO ACTS Additional EpiTrax Attributes	Learn about new attributes listed to be used by Case Investigators within EpiTrax.	10/05/20 Version 4.0

[MO ACTS Reporting: Export Data]()	In this section you will learn about the ability to export data through the reporting functionality within MO ACTS.	10/05/20 Version 4.0
MO ACTS Multiple Exposures for One Contact *See Vol.1 of Release Notes*	Learn about how MO ACTS will now show if a Contact to a COVID-19 case has had multiple exposures.	9/11/20 Version 3.0
MO ACTS System UI Enhancements *See Vol.1 of Release Notes*	Learn about various User Interface (UI) enhancements, including: additions to List Views, a new editable County field, enhancements to picklists, and a new Provider Name field.	9/11/20 Version 3.0
MO ACTS Surge Resource Enhancements *See Vol.1 of Release Notes*	Learn about case visibility when case ownership is transferred to a surge resource in your jurisdiction.	9/11/20 Version 3.0
MO ACTS Auto Task Logging for Calls Functionality *See Vol.1 of Release Notes*	In this section, you will learn how the process for logging calls has been updated to occur automatically during the Contact Outreach Process.	9/11/20 Version 3.0
MO ACTS Reporting Functionality *See Vol.1 of Release Notes*	Learn about the various reports that Business Admins and Supervisors are able to utilize to track usage of the MO ACTS System, the time it took for a contact tracing case to move to monitoring and support, and the ability to export reports and import data through the View/Configure Setup Menu Export Reports permission.	9/11/20 Version 3.0
MO ACTS Email Functionality *See Vol.1 of Release Notes*	Follow these steps the first time you send an Email through MO ACTS to set up a template.	8/20/2020 Version 1.1
MO ACTS Change County or Jurisdiction Functionality *See Vol.1 of Release Notes*	In this section you will learn how to update a Contact to a COVID-19 Case's county in the Personal Details screen of the Guided Script as well as how to change the Case's jurisdiction – Including important considerations related to this change.	8/20/2020 Version 1.1

MO ACTS In App Prompts

MO ACTS will now feature In App Prompts that will direct users through a URL link to the latest Release Notes document on the MO ACTS Intranet Site providing important information on the system enhancements. The prompts will appear the day after deployment occurs until the Thursday of the release week. If a user dismisses the notification, it will reappear after two days, giving them another opportunity to be directed to the Release Notes. This notification will appear, and will similarly need to be dismissed, on both the Home and Case tabs so that users will see the notification no matter what screen you were last viewing.

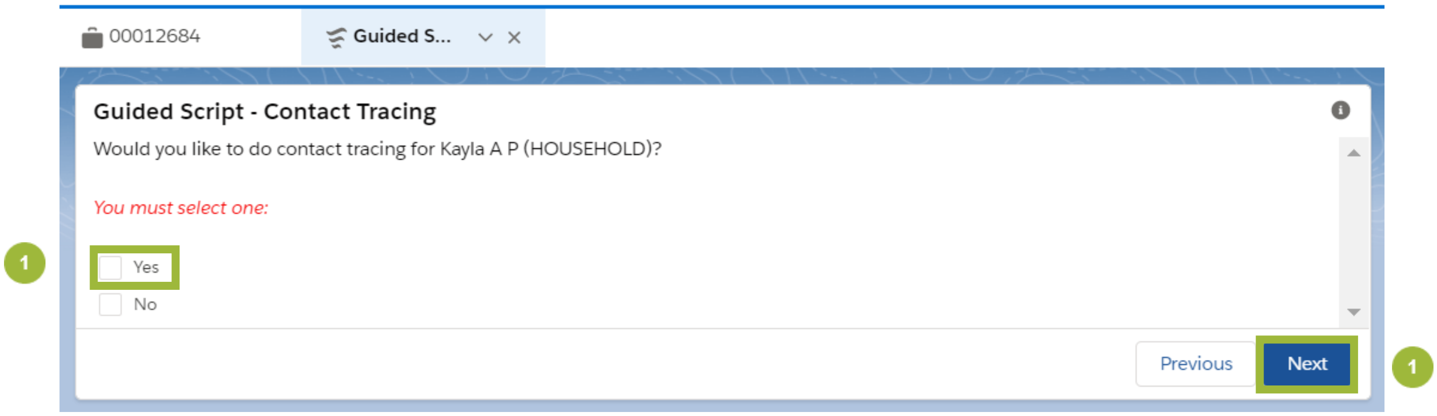


MO ACTS Submitting a Guided Script for Multiple Household Members

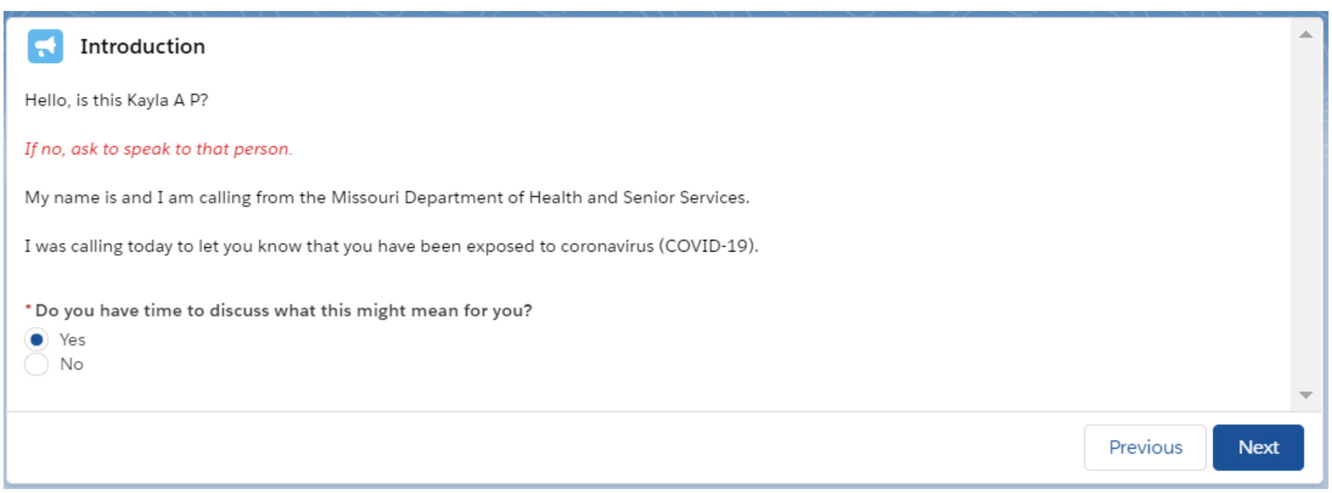
MO ACTS now has new functionality within the Guided Script for a Contact Tracer to complete the script for multiple contacts in a household when conducting outreach calls. Follow the steps below to learn how to process these contacts.

Processing Guided Scripts for Household Members

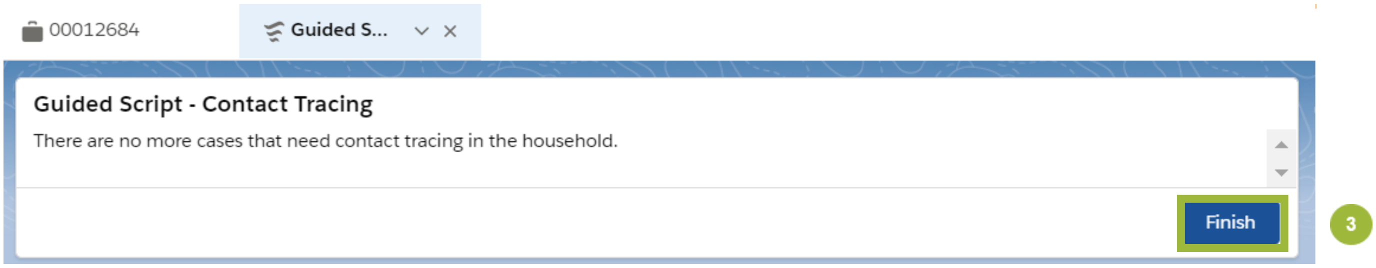
1. When a contact tracer is conducting an outreach call and reaches the end of the guided script, they will be asked if they would like to conduct contact tracing for another member of the household. The prompt will state the contacts name and contact type. This prompt occurs only when there are more cases in Awaiting Outreach in the household. Select yes and then click next.



2. The next screen will be the beginning of the new guided script for the household contact. Progress through the script as you would typically. Once complete, the contact tracer will continue to be prompted with beginning a new script for household contacts until each person in the household has been addressed.



3. Once every contact has been addressed, you will see a screen stating that there are no more cases needing contact tracing in the household. Click Finish.

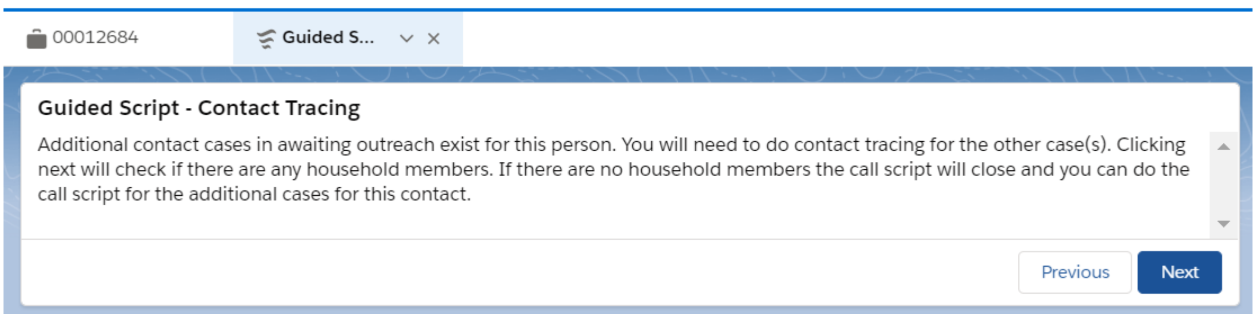


4. Once you hang up the call, an automated Task Log will appear. Fill in the details (date, call intention, etc.) and complete it as usual.

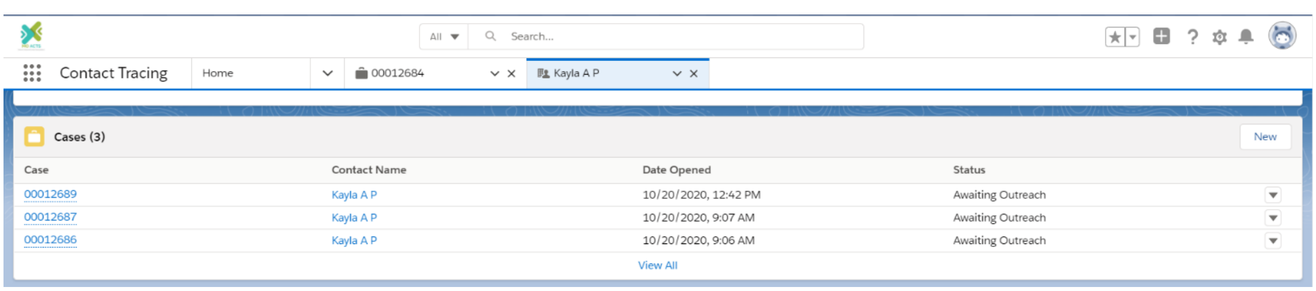
   NOTE: Keep in mind that only one call log task is logged to the and it is related to the last modified case. Guidance is to manually log the call for each member of the household.

Completing Contact Tracing for Contacts with Multiple Exposures

1. If there is a person who has been exposed to multiple positive patient cases and the outreach has not been started yet for more than one of the exposures, you will see this screen notifying you that there are additional records awaiting outreach for that person.



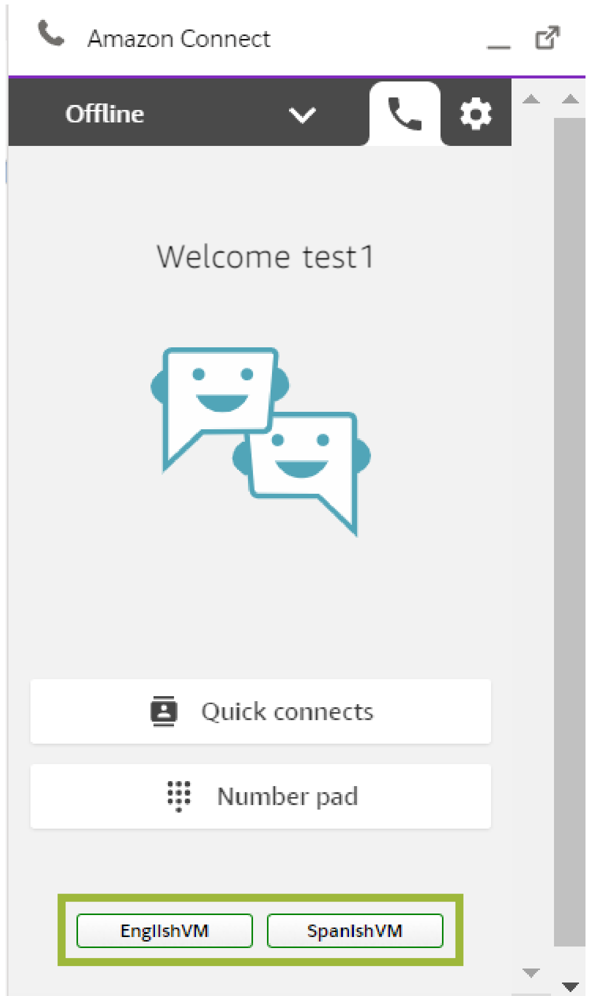
2. Lastly, it's important to note that for contacts with multiple contact cases, contact tracers will need to process the rest of the cases associated with the contact individually. This occurs when a contact has been exposed multiple times, for example. The cases are viewable under the Person Account under the Cases section.



MO ACTS English and Spanish Pre-recorded Voicemail

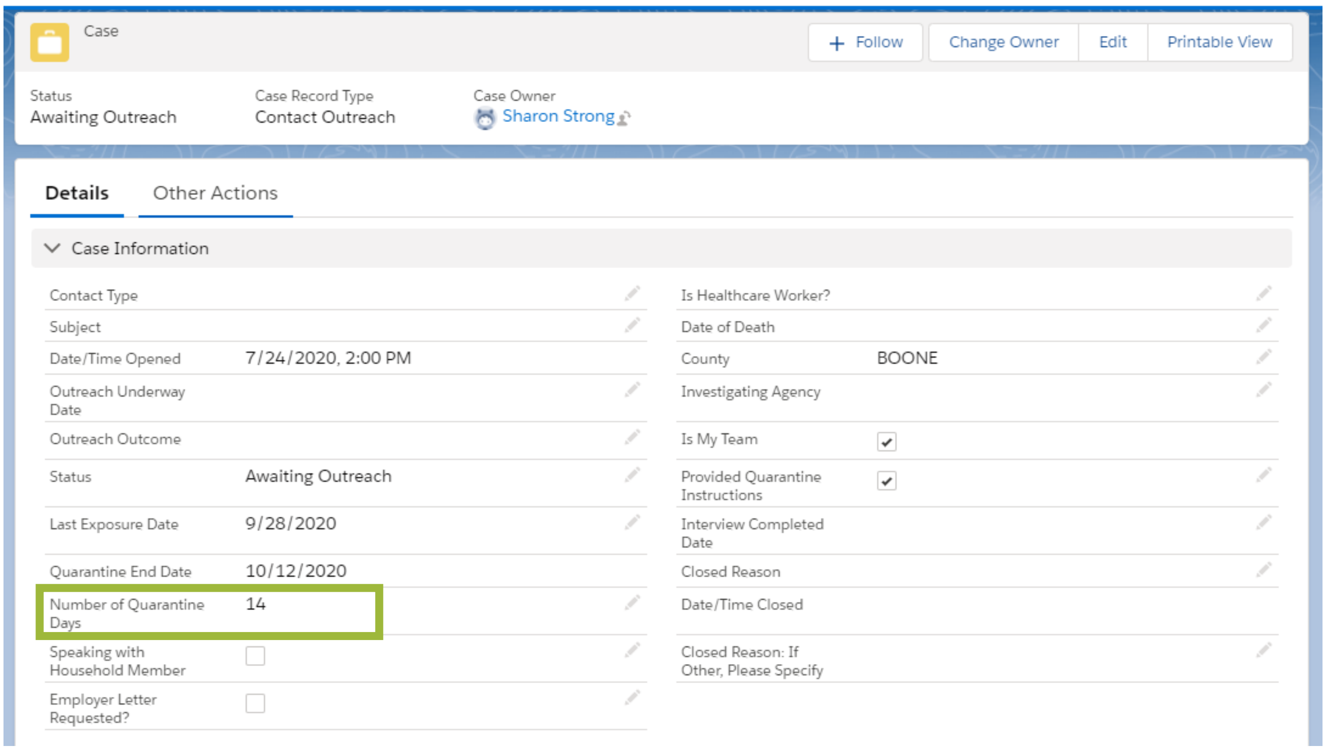
During the contact outreach process, contact tracers can leave a pre-recorded voicemail for the Contact to COVID-19 case if they do not answer. The Amazon Connect Softphone features a new “Transfer to Voicemail” button, as shown below. When you reach the contact’s voicemail, click this button to leave the pre-recorded voicemail. The automated Voicemail message is in both English and Spanish.

The complete voicemail message is as follows: Hello, I am calling from Department of Health for State of Missouri working with the Contact Tracing Collaborative. We are following up with you and will call you back soon. You are also welcome to call us back on 573-751-1656.



MO ACTS Quarantine Period Length

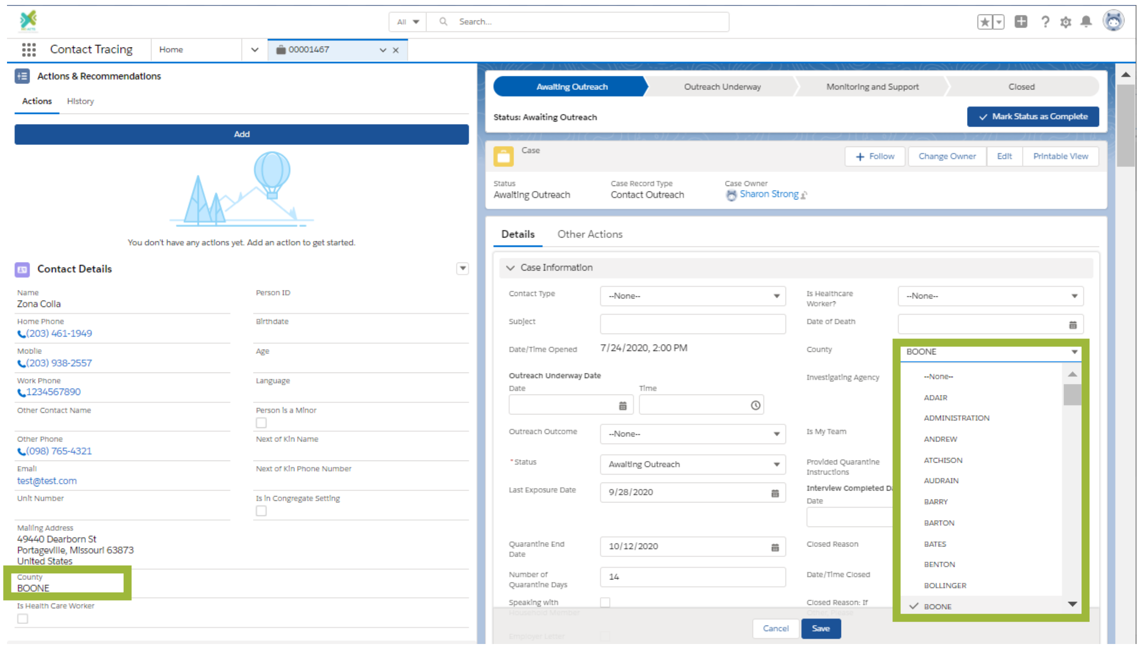
In MO ACTS there is now a new field for the total **Number of Quarantine Days**, found on the on the Case Details pane under the Case Information Section. This field is editable and will dynamically impact the **Quarantine End Date** field with the appropriate date based on the length of the Contact to a COVID-19 Case's quarantine period. Both the Number of Quarantine Days field and the Last Exposure Date field will impact the Quarantine End Date for the contact. Keep in mind that the Quarantine End Date field is not editable.



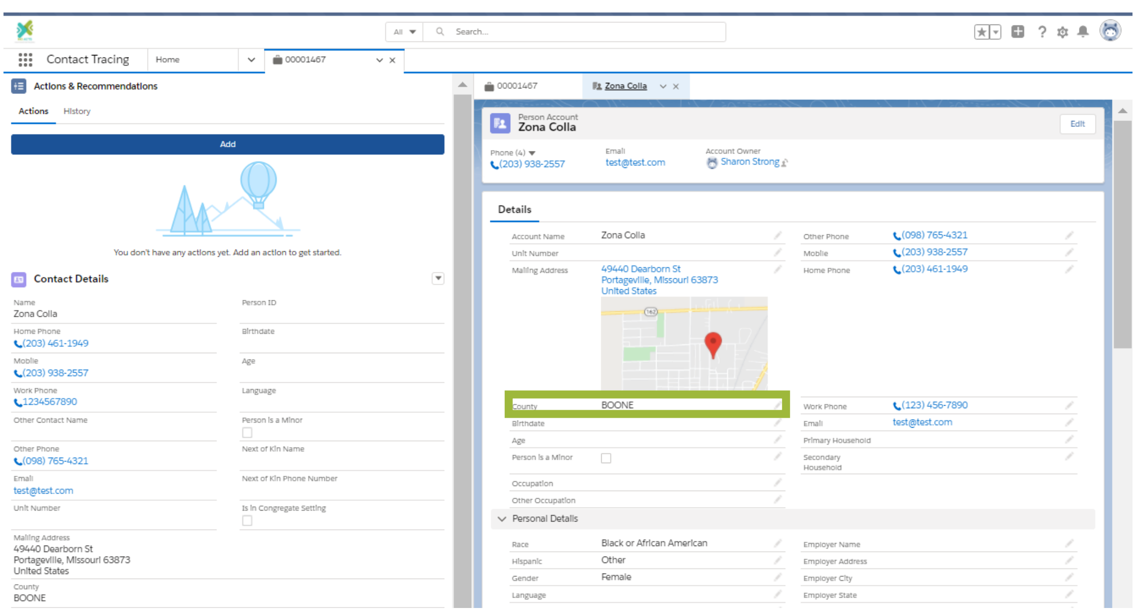
MO ACTS County Field on the Case and Account Records

MO ACTS users can now find the County field on both the Contact Details and the Person Record. These fields will sync between the account/contact record and the case record. The county field will be a dropdown that you can edit.

NOTE: When you change the county, be aware that permissions for this case will change as well, preventing you from accessing this record after saving if you are not a member of the updated jurisdiction. The case will also disappear from the current queue once it is closed (e.g. once the call ends). If the jurisdiction that the case is assigned to does not have any users in the MO ACTS platform, the case will be directed to the Administration queue.



Users can also find the county field on the Person Account Record:



MO ACTS Automatic Case Monitoring: SMS Messages Functionality

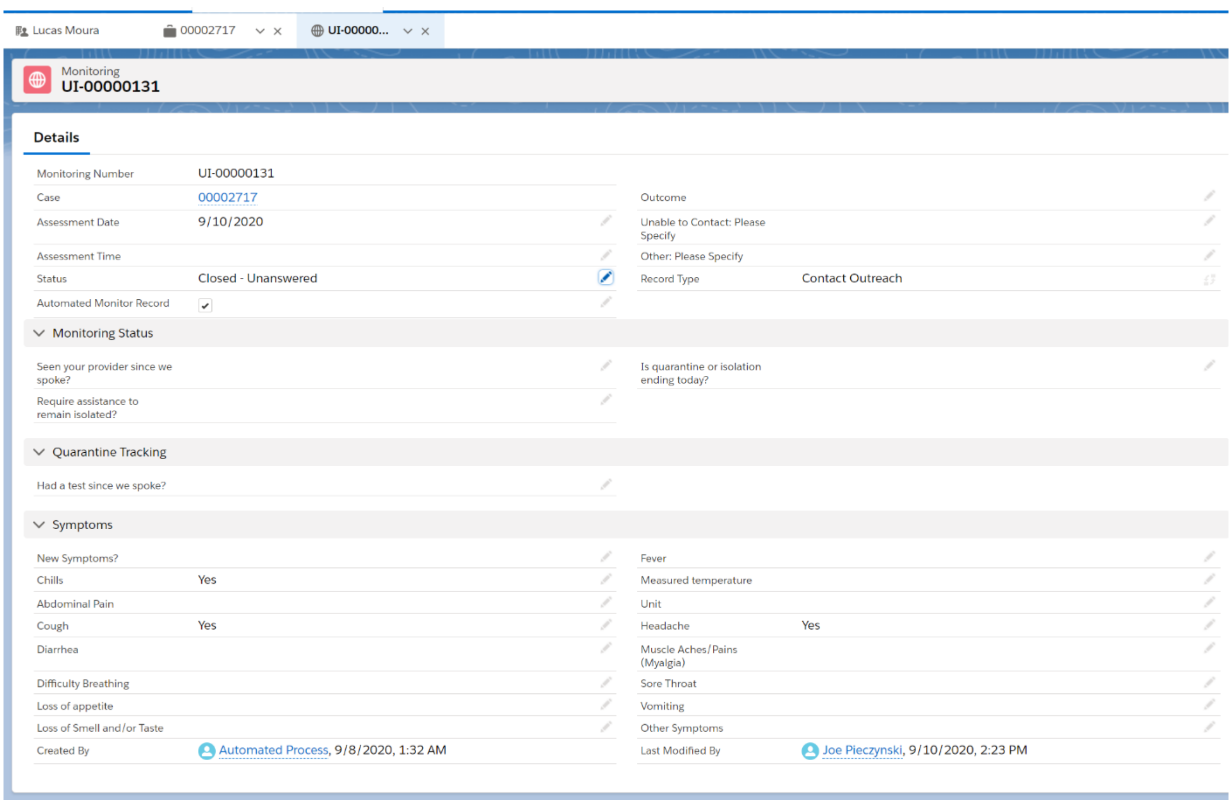
In this section you will learn how cases can be monitored by using MO ACTS to automatically send SMS messages to contacts during their quarantine duration in order to efficiently track their symptoms if/as they arise as well as the symptoms of members in their household.

MO ACTS will automatically generate SMS messages to actively monitor contacts by linking to a form to collect symptoms every day for the duration of quarantine (14 days since the last exposure date). This will occur as long as the case meets the following criteria, which is used when the contact validates their identify when self-logging symptoms:

1. The **phone number field** on the case record is populated
2. The **email field** on the case record is populated
3. The **birth date** field on the case record is populated

The data entered by the Contact each day will generate a monitor record in MO ACTS as depicted below which the Contact Tracer can view in the Contact Outreach Case record.

NOTE: If when speaking to the Contact they are aware of and provide a new date of last exposure, the contact tracer can manually update this field in Salesforce **and** EpiTrax individually. The monitoring would then continue 14 days past the most recently populated Last Exposure Date.


Lucas Moura | 00002717 | UI-00000...

Monitoring
UI-00000131

Details

Monitoring Number	UI-00000131		
Case	00002717	Outcome	
Assessment Date	9/10/2020	Unable to Contact: Please Specify	
Assessment Time		Other: Please Specify	
Status	Closed - Unanswered	Record Type	Contact Outreach
Automated Monitor Record	✓		

Monitoring Status

Seen your provider since we spoke?		Is quarantine or isolation ending today?	
Require assistance to remain isolated?			

Quarantine Tracking

Had a test since we spoke?	

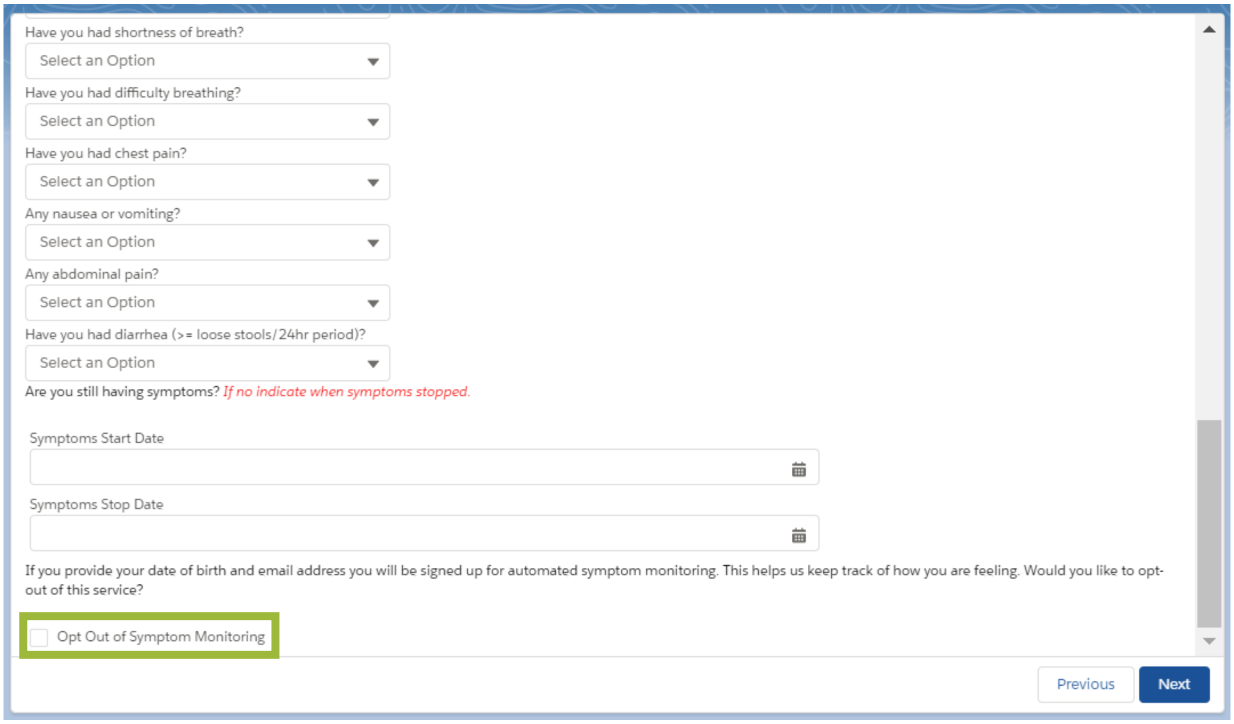
Symptoms

New Symptoms?		Fever	
Chills	Yes	Measured temperature	
Abdominal Pain		Unit	
Cough	Yes	Headache	Yes
Diarrhea		Muscle Aches/Pains (Myalgia)	
Difficulty Breathing		Sore Throat	
Loss of appetite		Vomiting	
Loss of Smell and/or Taste		Other Symptoms	
Created By	Automated Process, 9/8/2020, 1:32 AM	Last Modified By	Joe Pieczynski, 9/10/2020, 2:23 PM

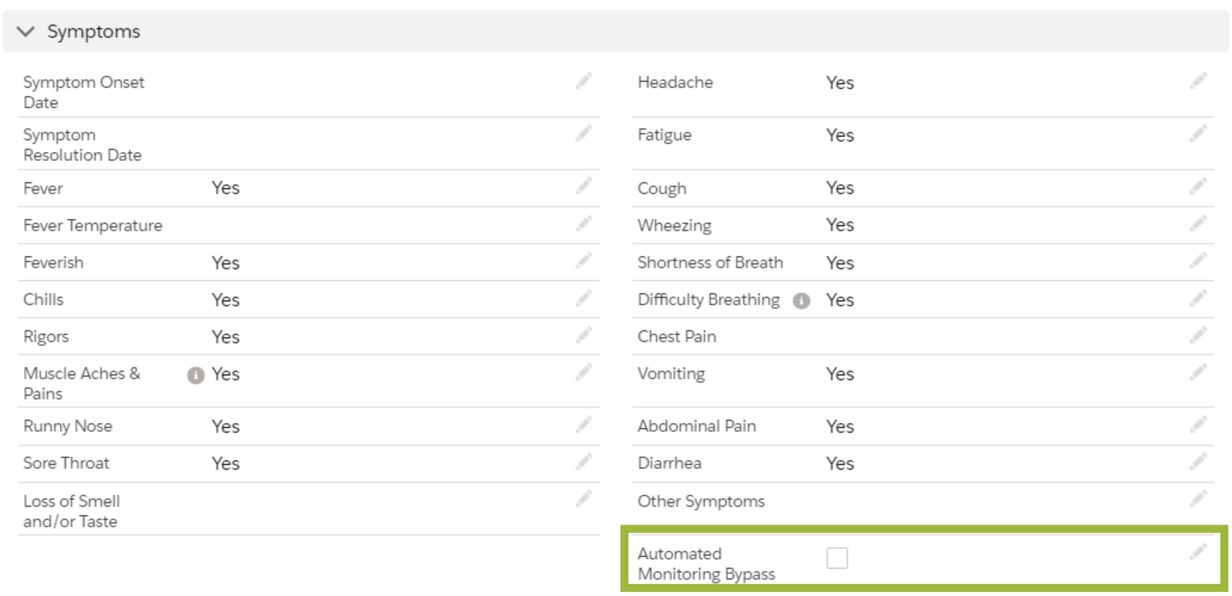
NOTE:

The MO ACTS system will attempt to send a message if there are one or more phone number(s) pre-populated to the case record, even if the phone is a landline. At this time, we cannot track if a message was received, however, **we recommend asking the contact during the outreach process whether or not they would like to receive a SMS message to monitor their symptoms**. If not, the contact tracer can bypass auto case monitoring for the contact by either the checkbox in the **guided script** at the end of the symptoms section, or by using the checkbox within the **Case Details** under the Symptoms section. The contact tracer will then follow the standard case monitoring procedures in place.

Guided Script – Symptoms Section:



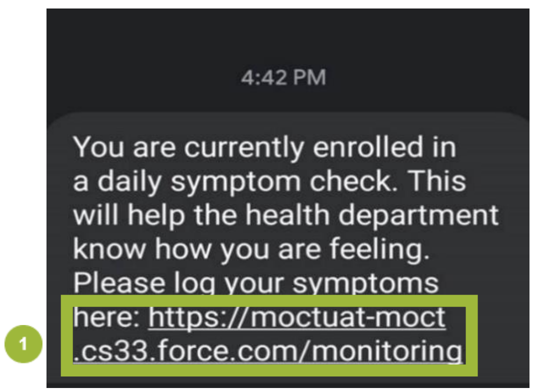
Case Details – Symptoms Section Manual Bypass:

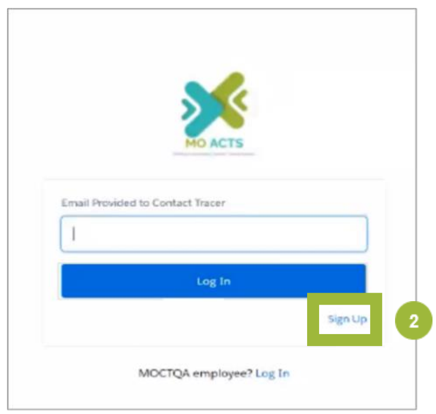


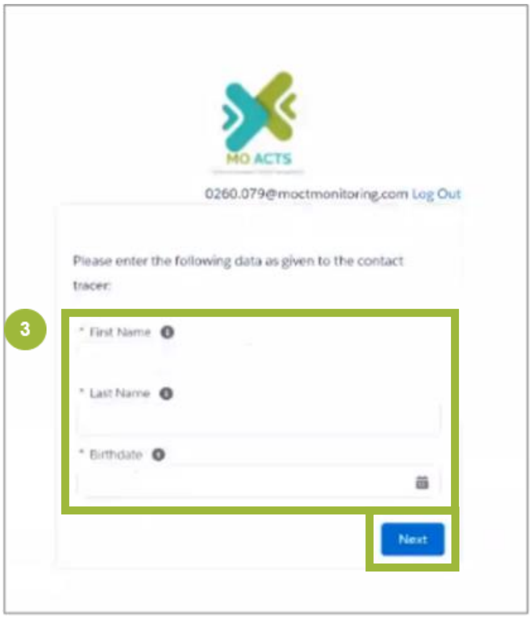
For awareness, this is what the Contact to a COVID-19 Case will see and the steps they will take once they receive the text to provide and track their symptoms, starting with signing in for the first time.

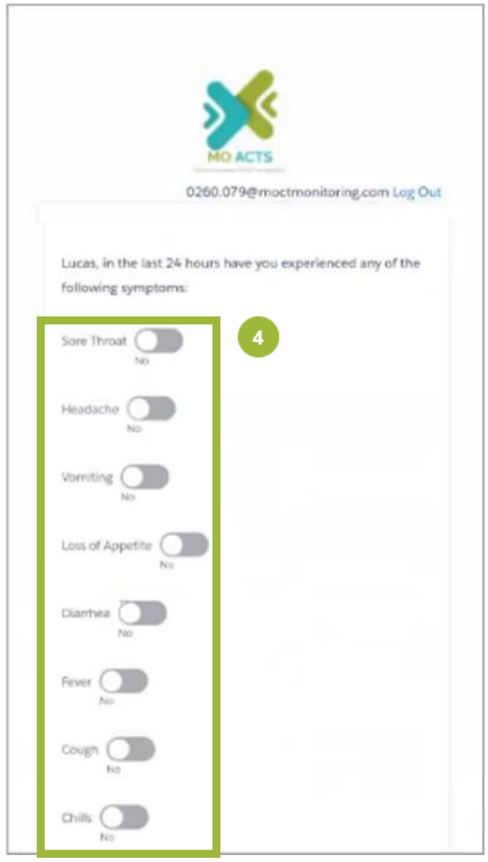
1. The contact will receive the SMS message at **9 AM CST** every day during the quarantine period.
2. The contact will click the link, and then will need to select **Sign Up** for their first-time logging in. If not, they will receive an error message.
3. Once signed up and authenticated, they will enter their information (**First Name**, **Last Name**, and **Birthdate**) as was given to the contact tracer and select **Next**.
4. Then, they will be able to track their symptoms which will then be collected in the monitor record automatically.
5. Additionally, for a contact in a household, they can continue to fill out symptom and monitoring information for the rest of the members of the household through the same process once they have submitted their own information and have returned to the screen with First Name, Last Name, and birthdate.

NOTE: If a member of a household is not a contact in MO ACTS, their monitoring information cannot be submitted. Additionally, once any household member fills out symptoms for a specific person, all of the active monitoring records for that person are disabled so no other person in the household can go in and resubmit symptoms for that person that day.






MO ACTS
0260.079@moctmonitoring.com Log Out
Please enter the following data as given to the contact tracer:
3
* First Name
* Last Name
* Birthdate
Next


MO ACTS
0260.079@moctmonitoring.com Log Out
Lucas, in the last 24 hours have you experienced any of the following symptoms:
4
Sore Throat
No
Headache
No
Vomiting
No
Loss of Appetite
No
Diarrhea
No
Fever
No
Cough
No
Chills
No

MO ACTS Inbound Call Routing and Voicemail

In addition to Contacts to a COVID-19 case being able to call back through the MO ACTS number and Contact Tracers receiving these inbound calls, Contacts can now leave voicemails if their call is unanswered. A voicemail will trigger the creation of a missed call task and a notification will be sent to the assigned Contact Tracer. In this section you will learn how the voicemail functionality works in a few key scenarios and how it affects the routing logic for receiving inbound calls.

The Contact to a COVID-19 Case will be calling the existing AWS number for both inbound calling and for SMS call backs (573-751-1656).

When a Contact to a COVID-19 Case calls, the call will follow routing logic based first on the case being associated to a phone number or next through the associated jurisdiction/county. Resulting from this, a missed call task will be created automatically. There are three potential scenarios:

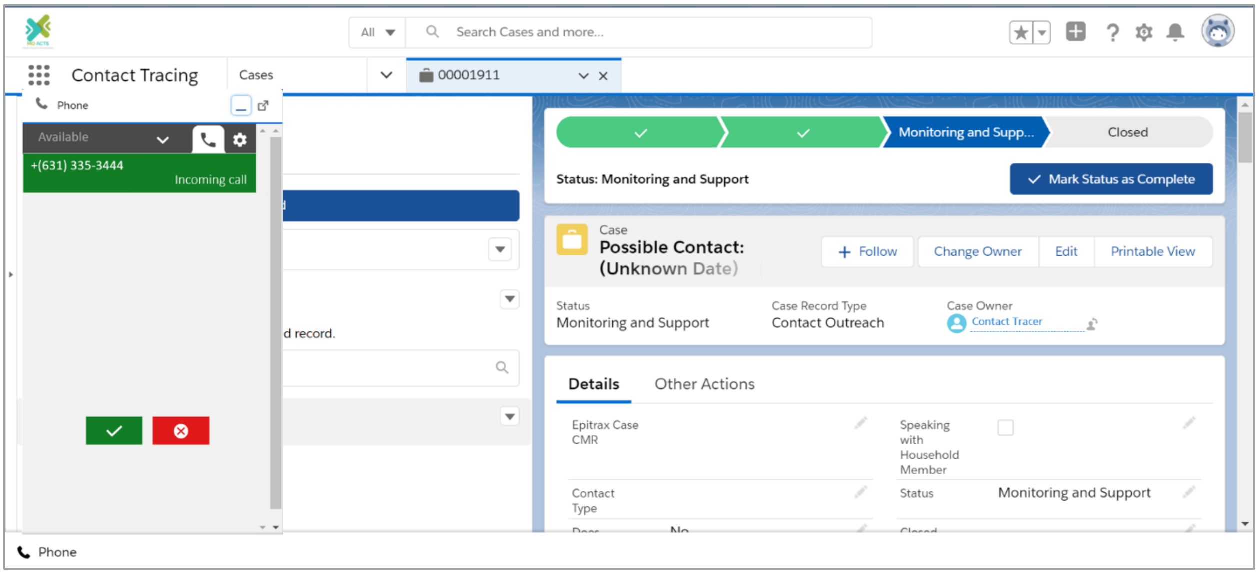
Scenario A - Phone Number is Associated to a Case and Assigned to a Contact Tracer: The call will route to the Contact Tracer assigned to the Contact to COVID-19 case and if they are unavailable, a missed call task along with a voicemail will be created automatically and appended to that case. A missed call notification will appear for the Contact Tracer on the notification bell.

If the Contact Tracer's Amazon Connect status is set to Available but they do not answer the call, the caller will be on hold for two minutes and then will be prompted to leave a voicemail. A missed call task along with a voicemail will be created automatically and appended to that case. A missed call notification will appear for the Contact Tracer on the notification bell.

Scenario B - Phone Number is Associated with a Jurisdiction: The call will route to the associated LPHA queue. The contact will then hear hold music for 30 seconds and if no Contact Tracer within the LPHA queue is available to answer, the contact can leave a voicemail and a missed call task will be created automatically and appended to that case. A missed call notification will not appear; contact tracers should view the Tasks tab and filter for their respective jurisdiction as shown below in the LPHA or Administration Queue: Receiving a Missed Call Notification, Listening to the Voicemail, and Reassigning the Case section.

Scenario C - Phone Number has No Associated Jurisdiction (Unknown Caller): The Call will route to their associated LPHA queue after a series of prompts or the Administration queue. Once routed, the contact will hear hold music for 30 seconds and if no Contact Tracer within the Administration queue (DHSS) is available to answer, the contact can leave a voicemail and a missed call task will be created automatically and append to that case. A missed call notification will not appear; contact tracers should view the Tasks tab and filter for their respective jurisdiction as shown below in the LPHA or Administration Queue: Receiving a Missed Call Notification, Listening to the Voicemail, and Reassigning the Case section. See below for more information on Unknown Call Routing.

Upon the contact tracer receiving an inbound call, the Contact Tracer's Amazon Connect softphone will automatically pop-up and show a screen similar to the one below if their status is set to available.



NOTE:

- The phone number of the Contact to a COVID-19 Case of the incoming call will be displayed on top of the Amazon Connect screen.
- You will also find buttons to **Accept** or **Decline** the incoming call.

Unknown Call Routing

In this section you will learn how a call is routed when a contact calls in to MO ACTS using a phone number not associated with their case. This can happen when that contact calls from a new or borrowed phone number.

When the contact calls in, they will be prompted to state their county. If the caller's speech is understood by the system bot, they can confirm the county name by pressing 1 to be transferred over. If the caller's speech is not understood, the caller can either press 3 to enter their five-digit zip code on the number pad or will be prompted to speak up to two more times before they must enter their zip code. This process ensures that the caller will be directed to the correct jurisdiction.

NOTE: If users say the wrong county or enter the wrong zip code, they will be routed to the zip code they enter regardless. If users enter an invalid zip code, they will be routed to the Admin Queue.

Receiving a Missed Call from Contacts who Share a Phone

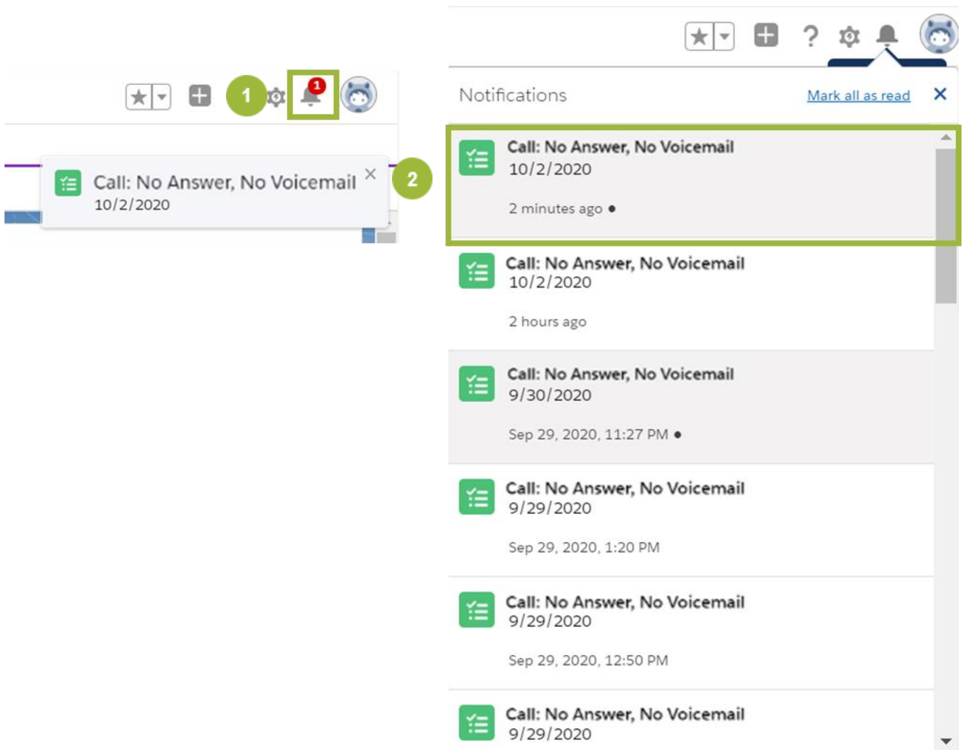
If a contact is calling using a phone that they share with another contact and their call goes unanswered, a missed call task along with a voicemail will be created and appended to the case that was last updated.

NOTE: Keep in mind that any time a contact tracer calls someone back, it is best practice to validate who you are speaking with first.

Contact Tracer: Receiving a Missed Call Notification and Listening to the Voicemail

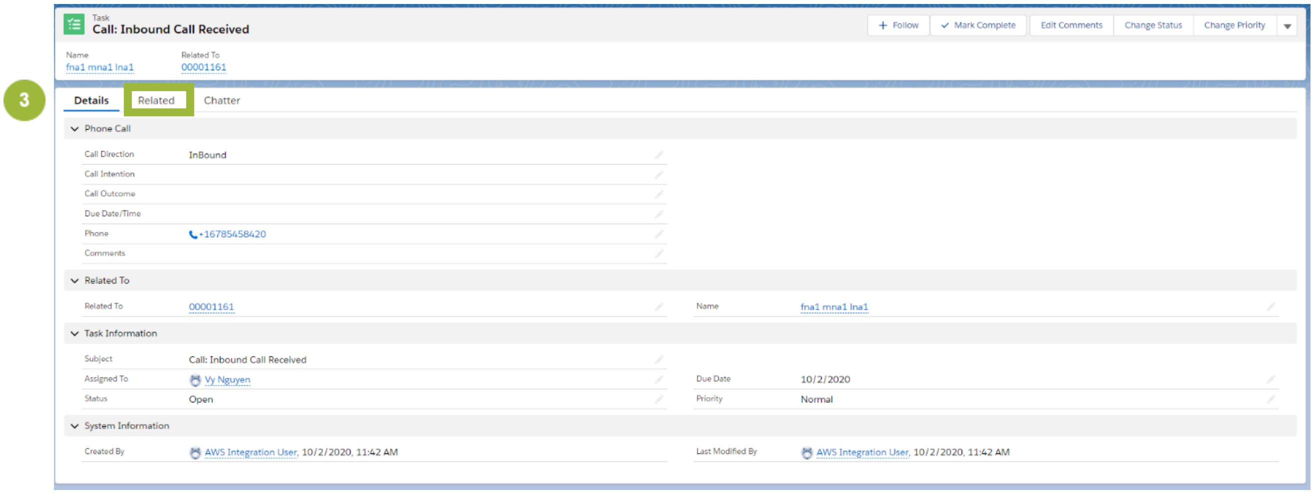
Below are the steps recognizing when you have missed a call and how to access the missed call task and associated voicemail.

1. From any screen in MO ACTS, a Contact Tracer will be able to see that they have a missed call notification through the **Notification Bell** at the top right of the MO ACTS screen. You can also check the **Today's Tasks** section from the **Home Screen**.
2. When you click the bell, a drop down will appear, showing you that you have a missed call. Click the notification.

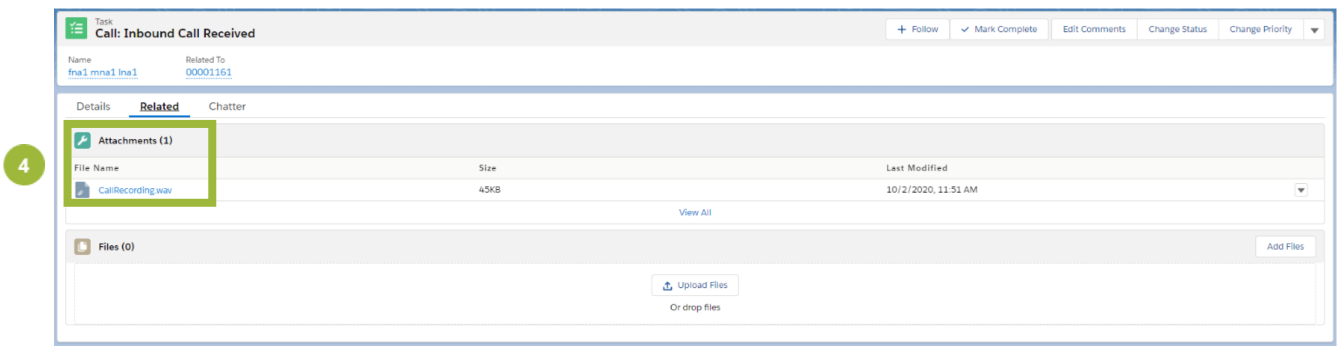


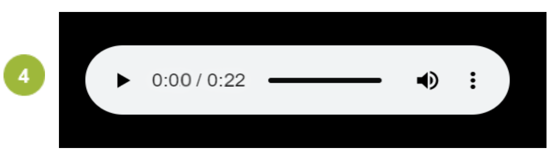
NOTE: Missed call notifications will not accurately reflect whether or not a caller left a voicemail. Always click into the notification or view the tasks queue to determine if a voicemail has been appended to the case.

3. Click on the **notification**. From here, a new window will open showing you the **Details tab** of the missed call task. Next, click the **Related tab**. Here you will be able to see the caller's voicemail message if one was left.



4. Click **Attachments** to find the link to the voicemail recording. When you click the voicemail, it will open a new window in your internet browser so that you can listen to it.



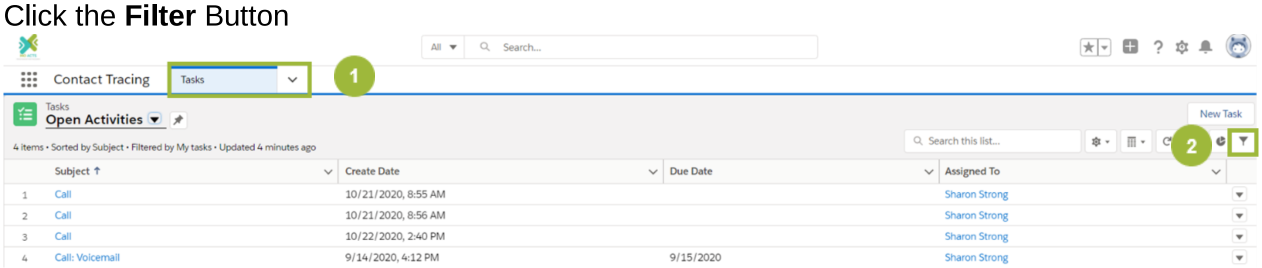


LPHA or Administration Queue: Receiving a Missed Call Notification, Listening to the Voicemail, and Reassigning the Case

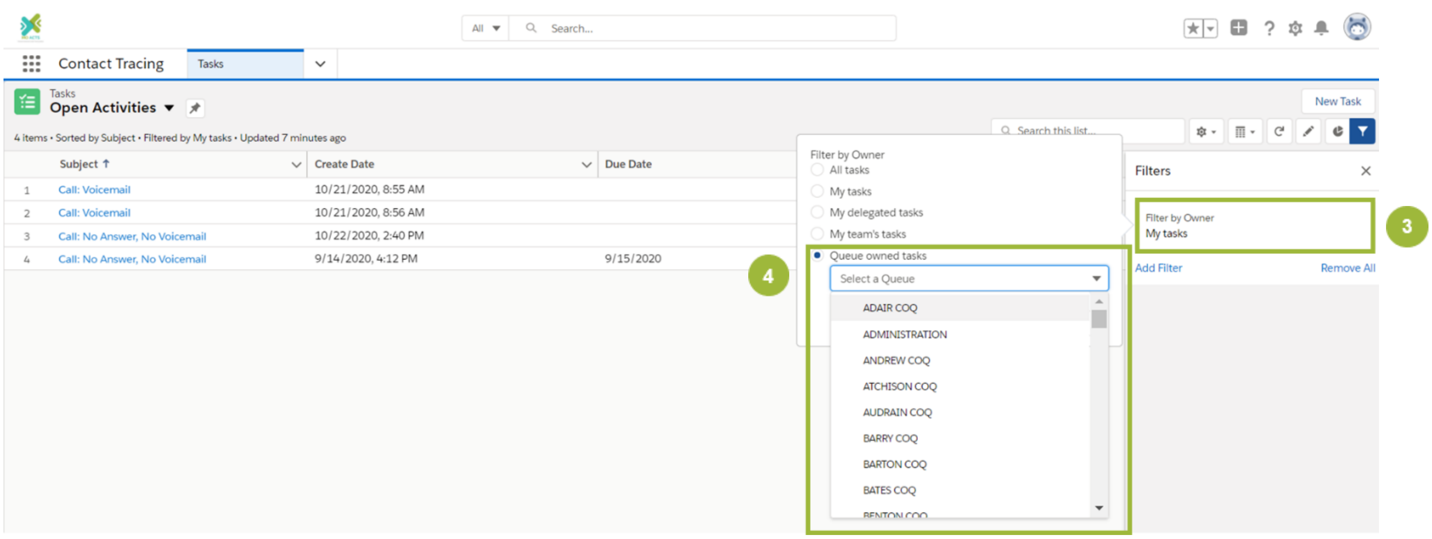
When a Contact to a COVID-19 case calls from a phone number that is not yet associated with a contact owned by a Contact Tracer, their call will be routed to the appropriate queue (jurisdiction or Admin). If the call goes unanswered, a missed call task will be created for the queue that can be found by viewing the tasks assigned to the respective queue. The missed call task can then be reassigned to a contact tracer to begin work on the contact case.

To view the missed call tasks for an LPHA or Admin Queue

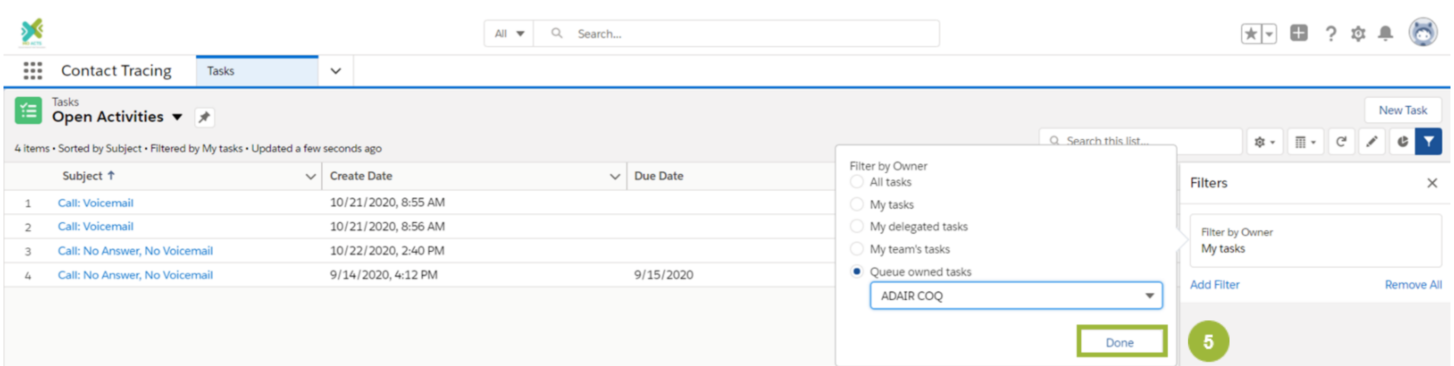
1. Navigate to the Tasks tab and use the drop down to open the Open Activities List View
2. Click the **Filter** Button



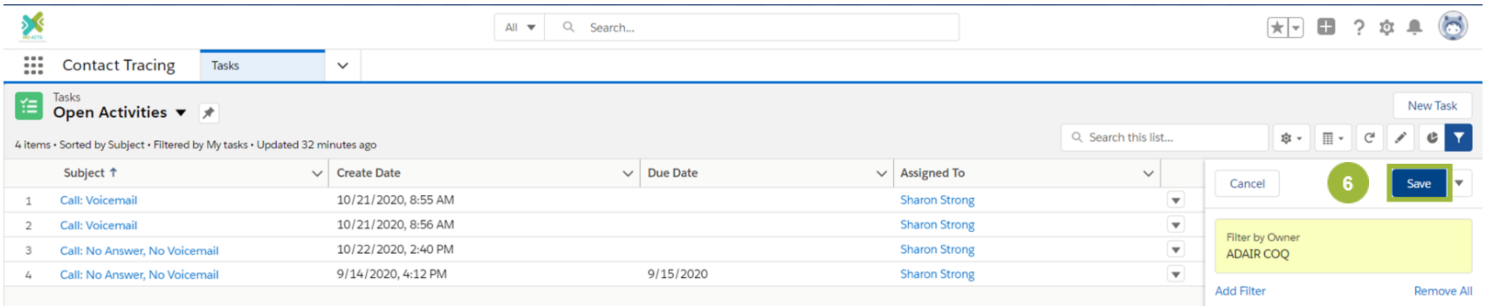
3. Click on **Filter By Owner**
4. Select **Queue Owned Tasks**, then select a Queue from the drop down



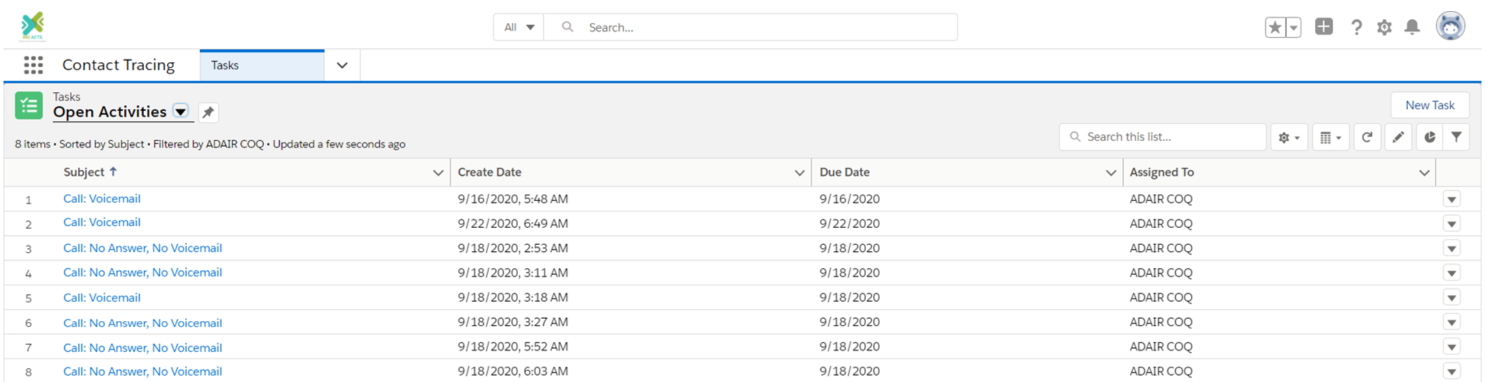
5. Click **Done**



6. Click **Save**

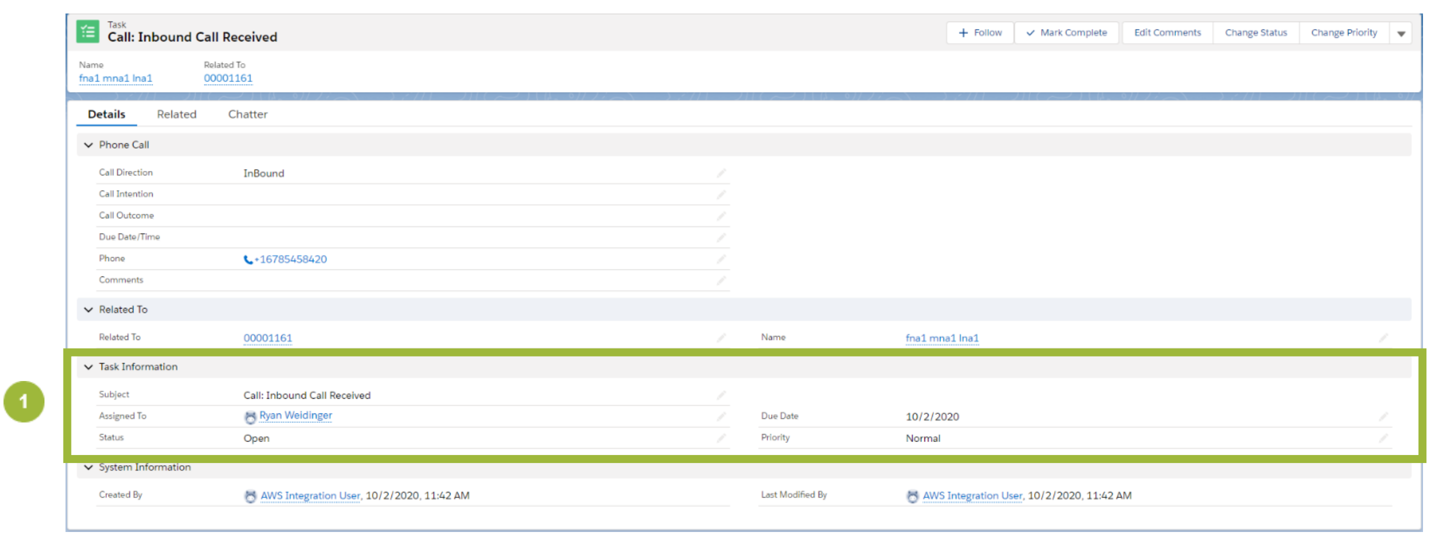


7. Your newly filtered list will display.

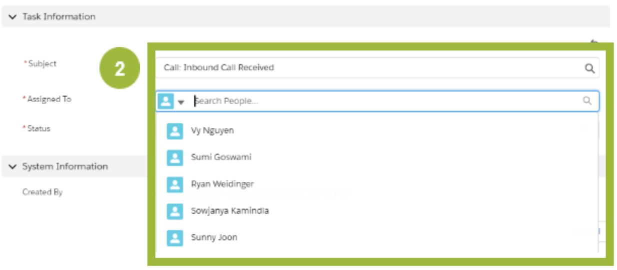


If reassigning the case to yourself or another Contact Tracer, please follow the steps below:

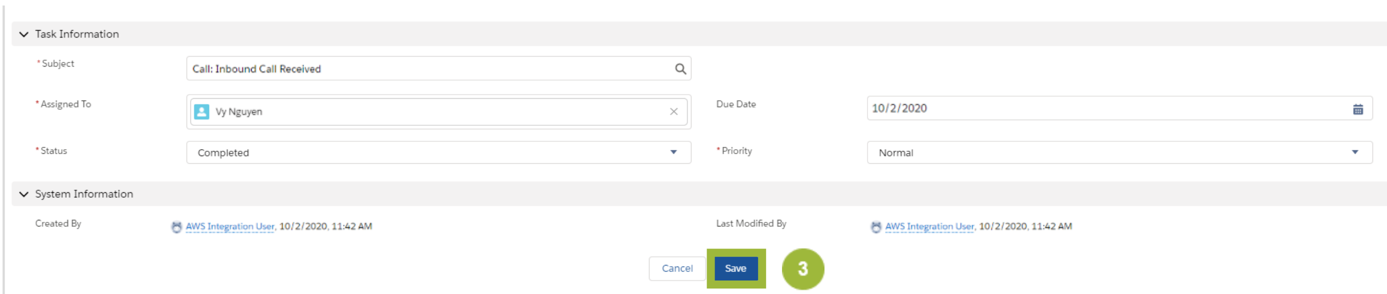
1. After you have opened the missed call notification through the **Notification Bell** icon, the missed call task will open, showing you the **Details tab**. To reassign a case to a contact tracer, locate the Task Information Section



2. Click on the pencil icon to edit the **Assigned To** field and search the name of the contact tracer you want to assign the case to



3. Click **Save**. The case will now be assigned to a Contact Tracer and they will receive a notification stating the Account Owner assigned a case to them.

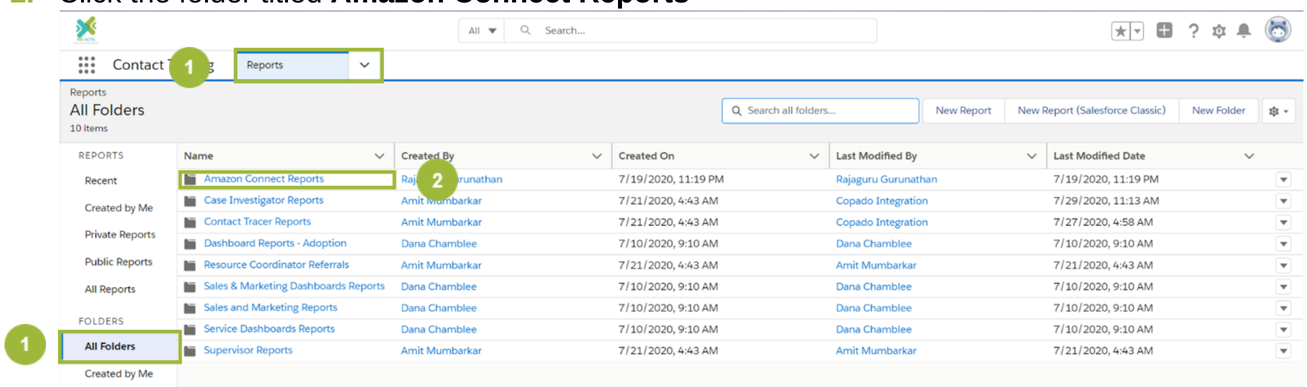


MO ACTS Amazon Connect Reporting

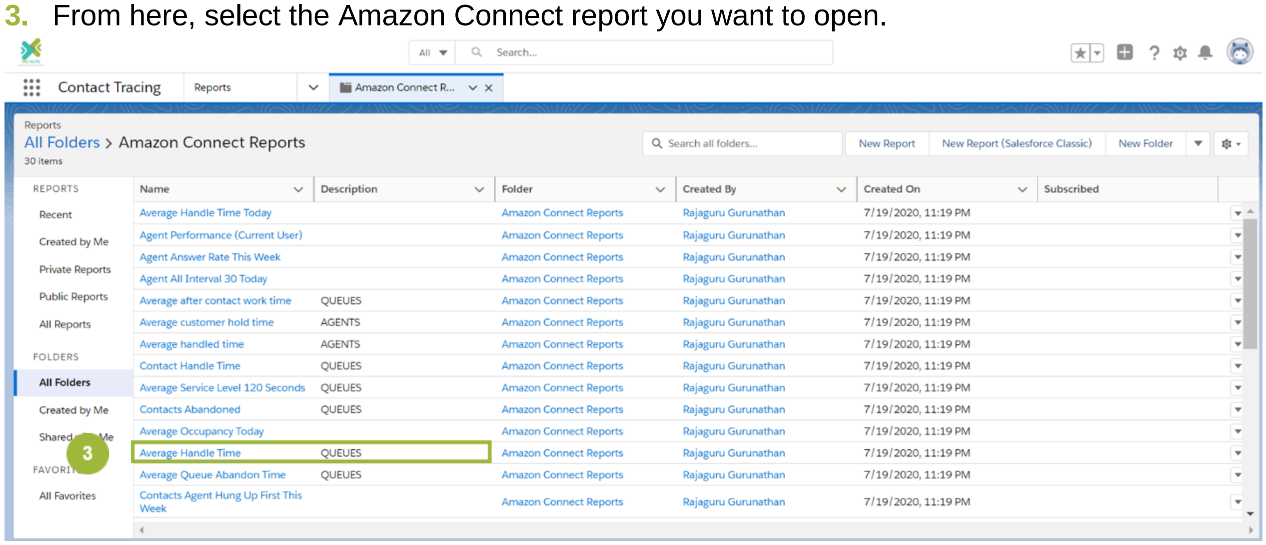
MO ACTS now has standard reports to view metrics from the Amazon Connect Softphone and Contact Tracers calls. This includes reports such as average handle time for contacts, abandon rates, and agent performance. These reports are available to all users as view-only but can be utilized as a base report to create your own custom reports once saved to the Private Folder. Learn more about reporting by visiting our new MO ACTS Deep Dive Training Simulation or the Supervisor Guide on the MO ACTS Intranet Site.

Follow the steps below to learn how to utilize this new functionality.

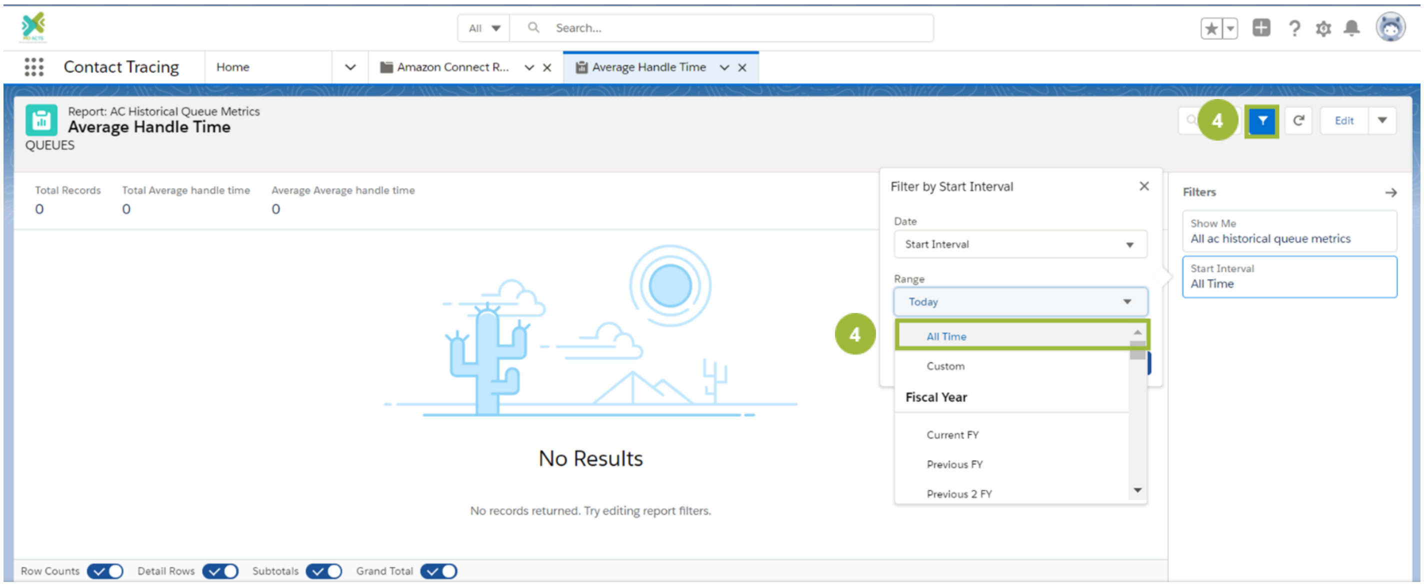
1. Navigate to the **Reports Tab** then click **All Folders**
2. Click the folder titled **Amazon Connect Reports**



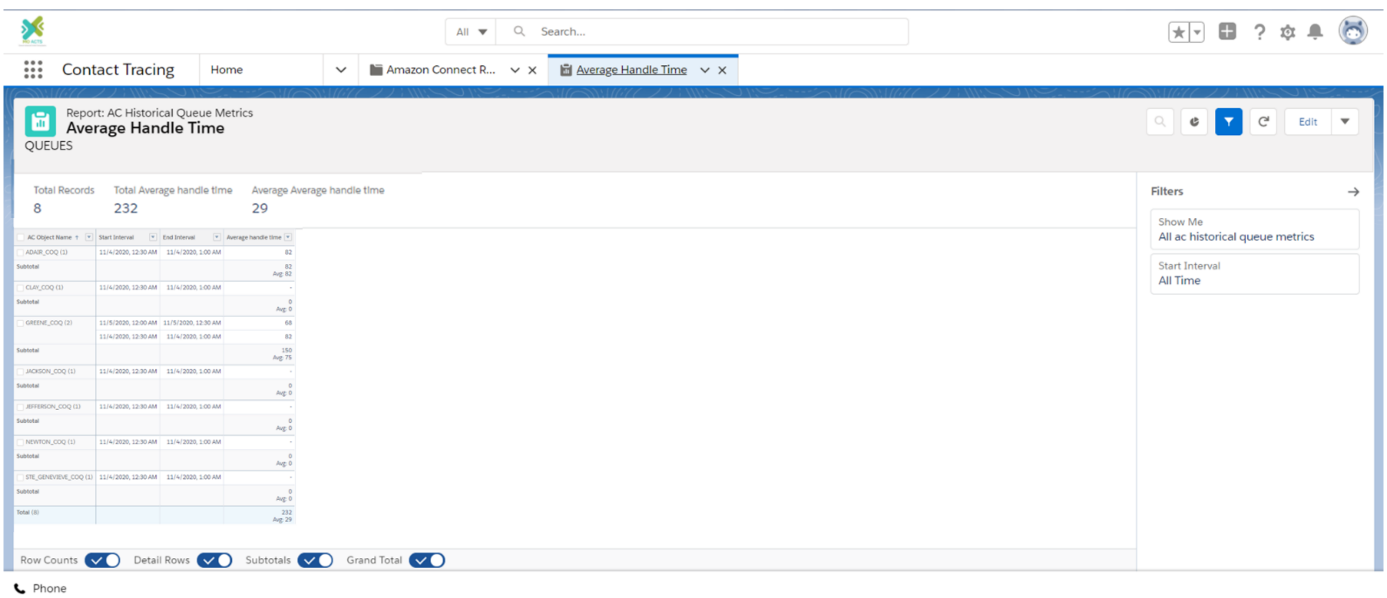
3. From here, select the Amazon Connect report you want to open.



4. We suggest first looking at the default filters to evaluate if the report will display the data you want, then update the filters as desired.
NOTE: By modifying any of the Public Reports you will be modifying them for all users in MO ACTS. The best practice is to save the report as a personal report before modifying. View the current filters by clicking the Filter button. For example, for Average Handle Time you may want to update the **Start Interval** since it is set to today's date. You can change this filter to **All Time** in order to see a larger range of data, then select **Apply**.



5. The report will now reflect the new filters.



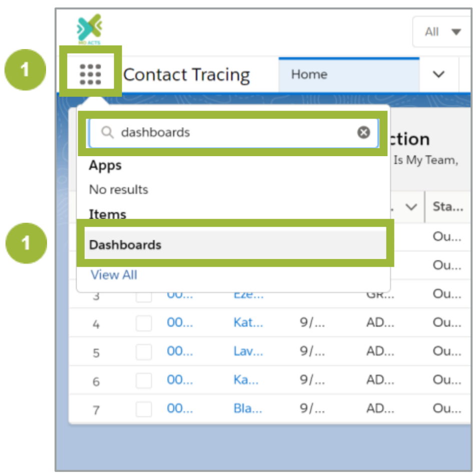
NOTE: Users will only be able to view data from their own jurisdiction. If you are a DHSS/Surge support user, you may have the ability to view data for multiple jurisdictions. To view only one jurisdiction, first save the public report as a personal report in the Private Folder. Then edit the report by clicking **Add Filter**, then select **AC Object Name**. Set the Operator field as Equals and the second field to the County you want to view.

MO ACTS Custom Dashboards

In addition to the pre-built dashboard functionality within MO ACTS, Contact Tracers can now create their own personal dashboards so that they can work with the selected reports side-by-side using them as components on a single page layout. By sourcing reports into a dashboard, Contact Tracers can customize how data is grouped, summarized, and displayed.

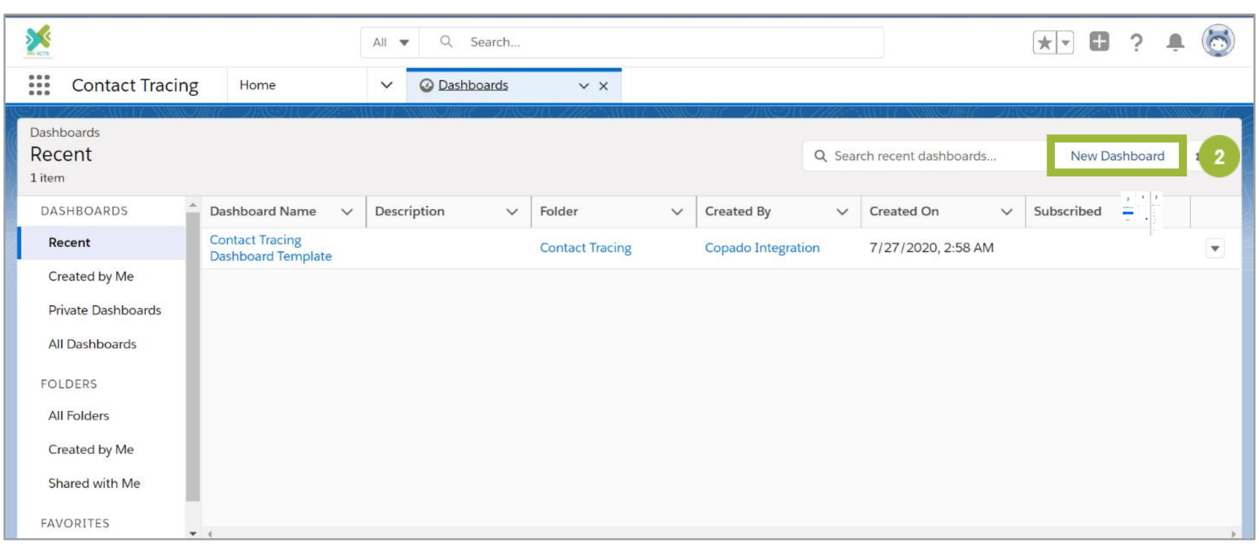
Below are the steps to customize dashboards.

1. From the home screen, use the waffle icon and search for Dashboards and then click it

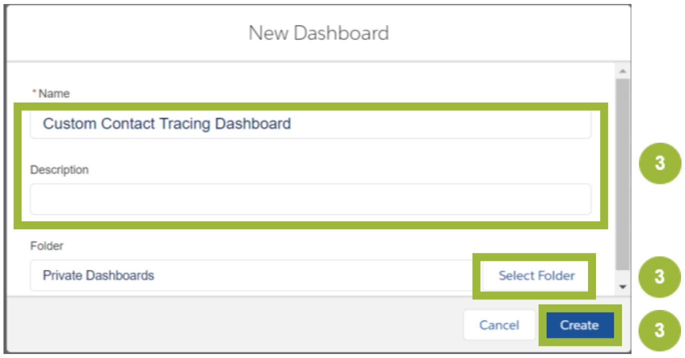


2. Launch the dashboard builder by clicking **New Dashboard**.

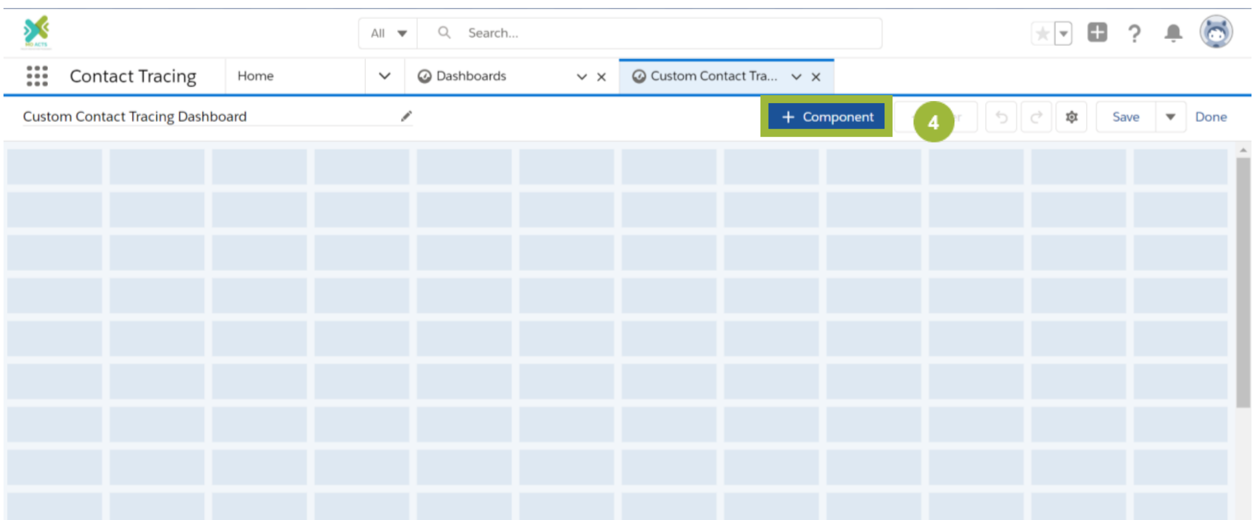
   NOTE: All Folders will show you all dashboards that have been created. Access to view each dashboard may vary.



3. Enter a name for your dashboard (e.g. “Custom Contact Tracing Dashboard”), add an optional description, select a folder to add it to, and click **Create**.

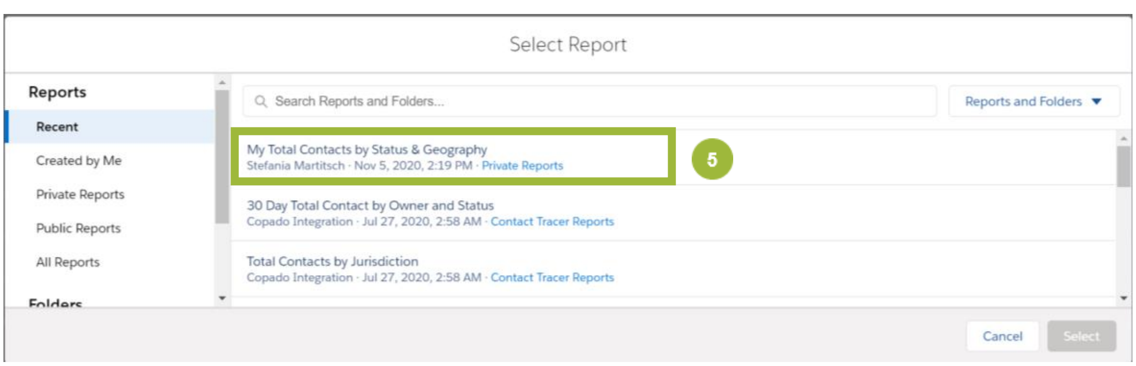


4. Insert a component to your dashboard by clicking **+ Component.**

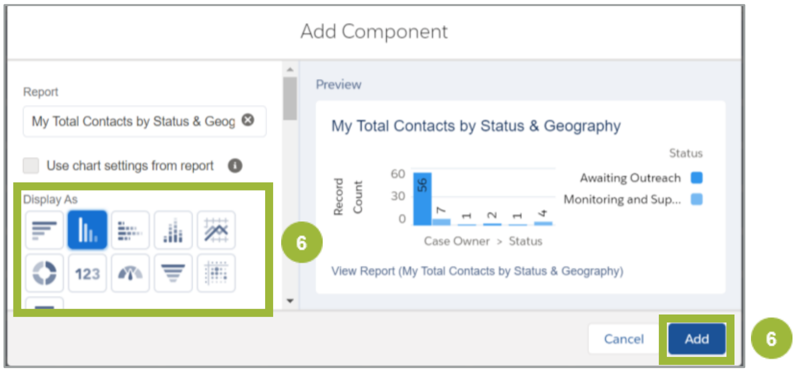


5. There will be a pop up where you can add reports to the dashboard. Click the report you want to add and then click Select.

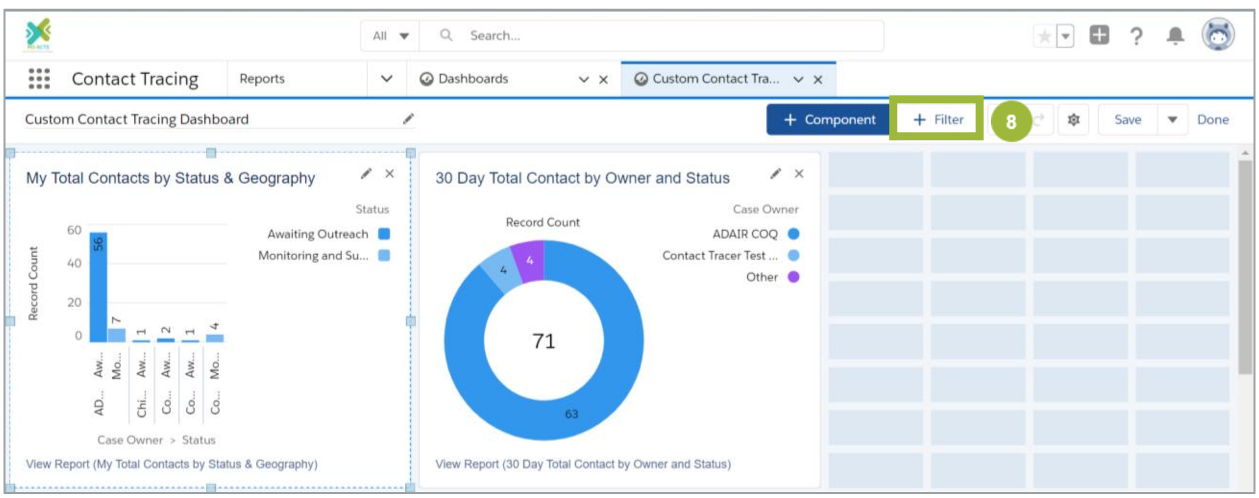
NOTE: When selecting a source report for use in a dashboard component, keep in mind that you can’t choose joined reports or historical trend reports.

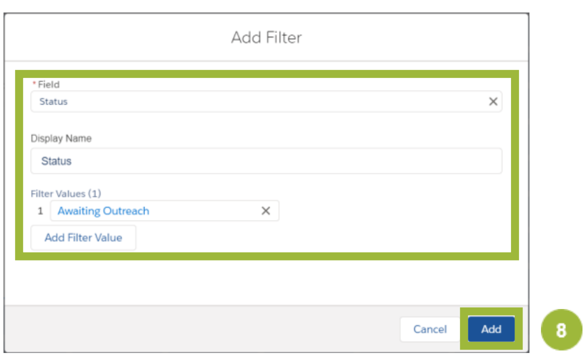


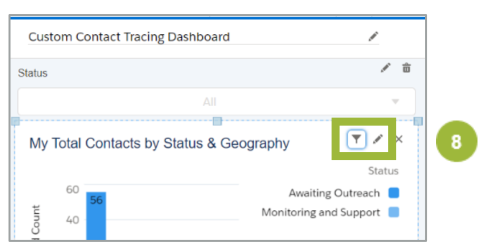
6. You will then have various options to visually display the report. Select chart type you'd like to use and preview on the right. Once it's set up how you like, click Add



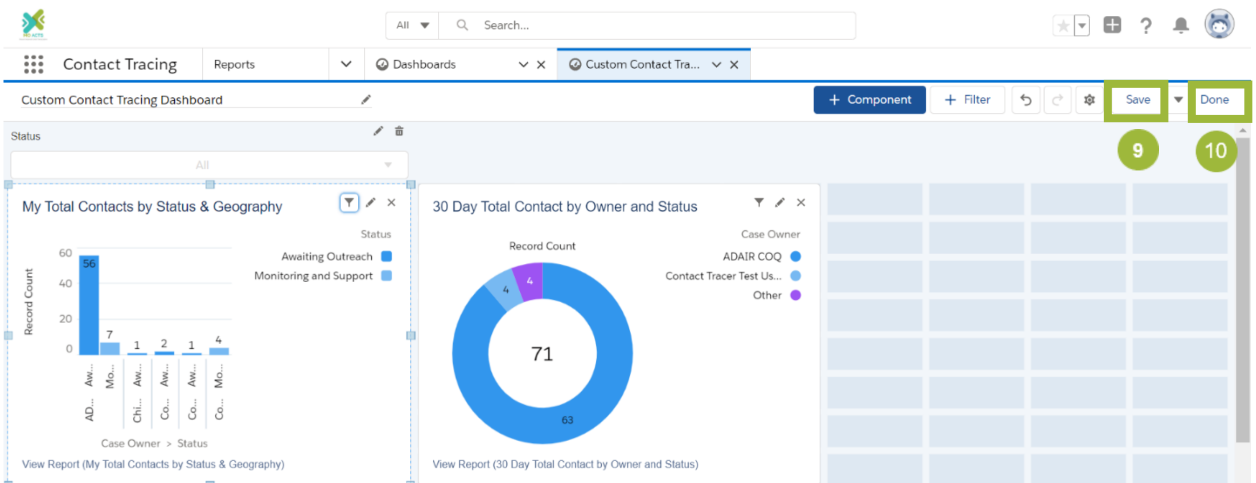
7. Now the report is added to the dashboard. Repeat the steps to add more reports to build out the dashboard.
8. If you want to filter data, click **+ Filter**. Once you edited your filter, click **Add.** Now, you can sort the components in your dashboard.





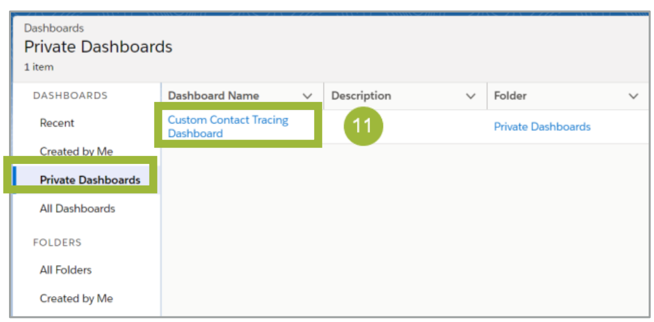


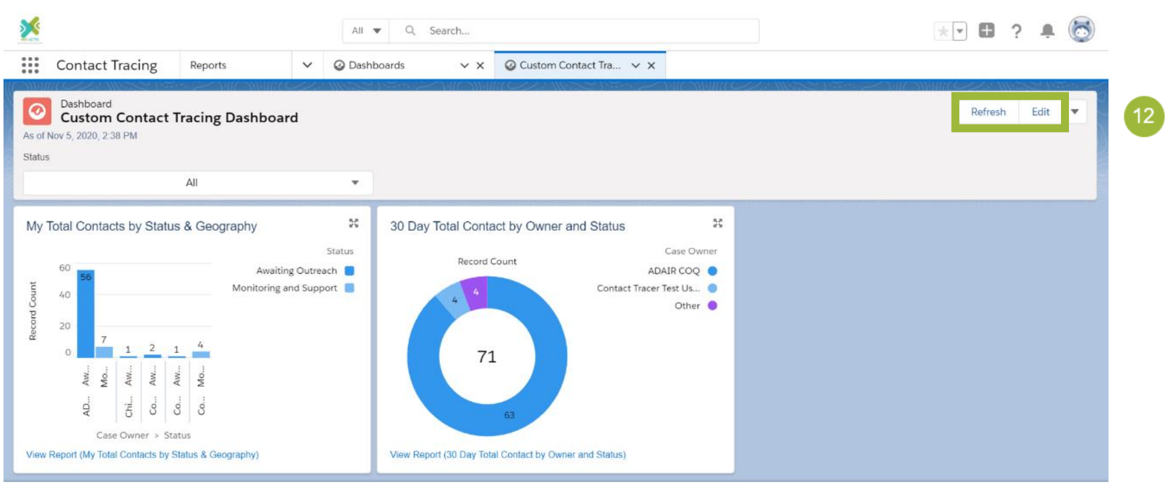
9. Click and drag components to rearrange them as you like. Click **Save.**
   NOTE: you can also click **Save as** to save a copy of this dashboard to any location.
10. Click **Done.** Now your dashboard is ready.



11. You will always be able to return to your dashboard by visiting the folder it is in. Click the dashboard title to open it.
12. You can click **Refresh** for the most up to date version of the data while you have it open. You can **Edit** to make changes.

    NOTE: You can also click Subscribe to receive emails at your chosen frequency and even share updates with colleagues if the dashboard is in a public folder.





MO ACTS Household Management

MO ACTS now has functionality to manage multiple contacts in a household. If the contact is a household member (e.g. resides in the same living space with other contacts) a contact tracer can streamline outreach by speaking with household members at once and updating their cases together versus individually calling each member.

In this section we will show you how to view if a contact is a part of a household and view additional details that can help inform your contact tracing activities.

Households are established in EpiTrax and the data flows over to MO ACTS using the Case CMR number to link together contacts within a household. Relationship to a case in EpiTrax will display as Contact Type in MO ACTS.

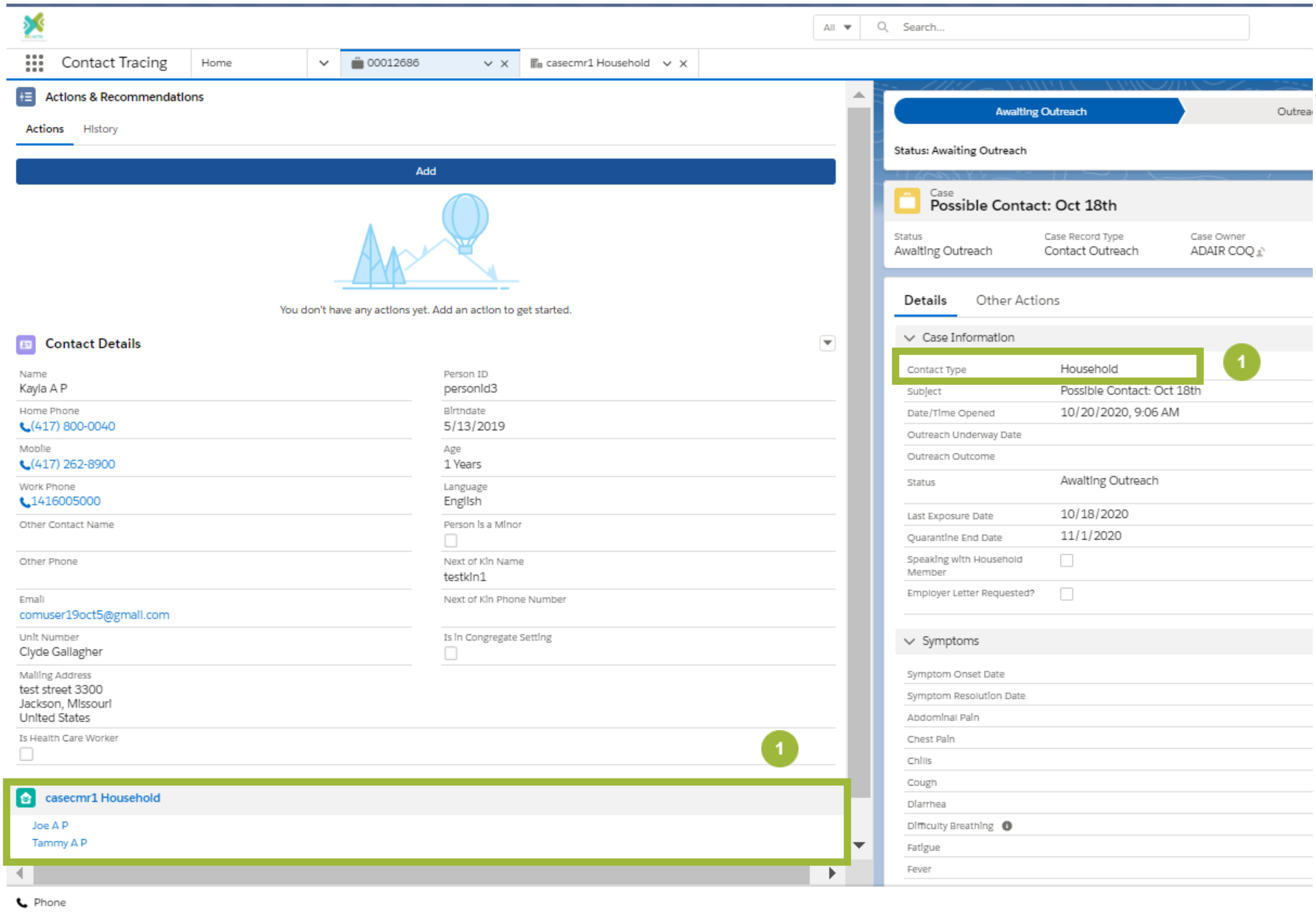
Contact Type helps group members of a household through their various roles. You will see the following attributes used:

- Adult Household (Default for Adults in Household)
- Child by case mother (Biological child)
- Child by other mother (Non-biological child)
- Household (Any person sharing the same household)
- Infant (Child under 1 year of age)
- Spouse Sexual Contact (External Sexual Contact to a Spouse/Adult in Household)

NOTE: Users will not have the ability to create a household in MO ACTS. It is best practice not to edit relationships within a household as this data is pre-determined in the case investigation process within EpiTrax and should be used solely to inform contact tracers about the contact's they will be tracking.

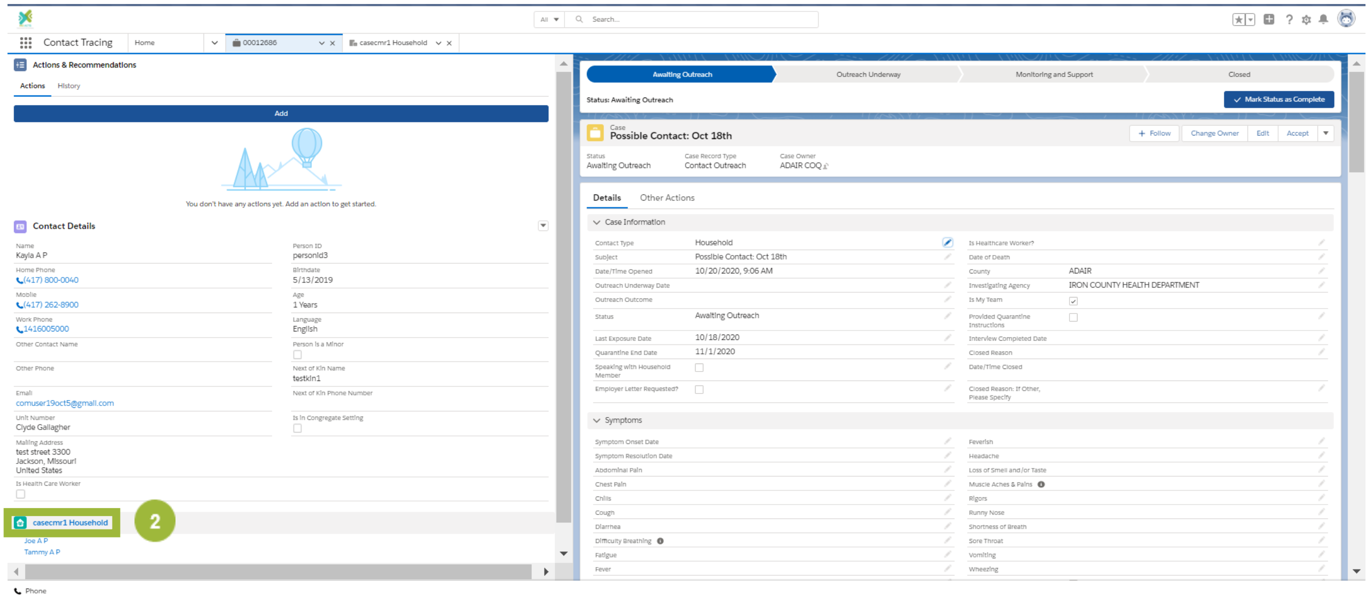
How to Review a Contact's Household Details

1. Review the contact details on the left-hand side of a case record to check if the contact is a member of a household. Additionally, check their contact type to learn their role in the household.

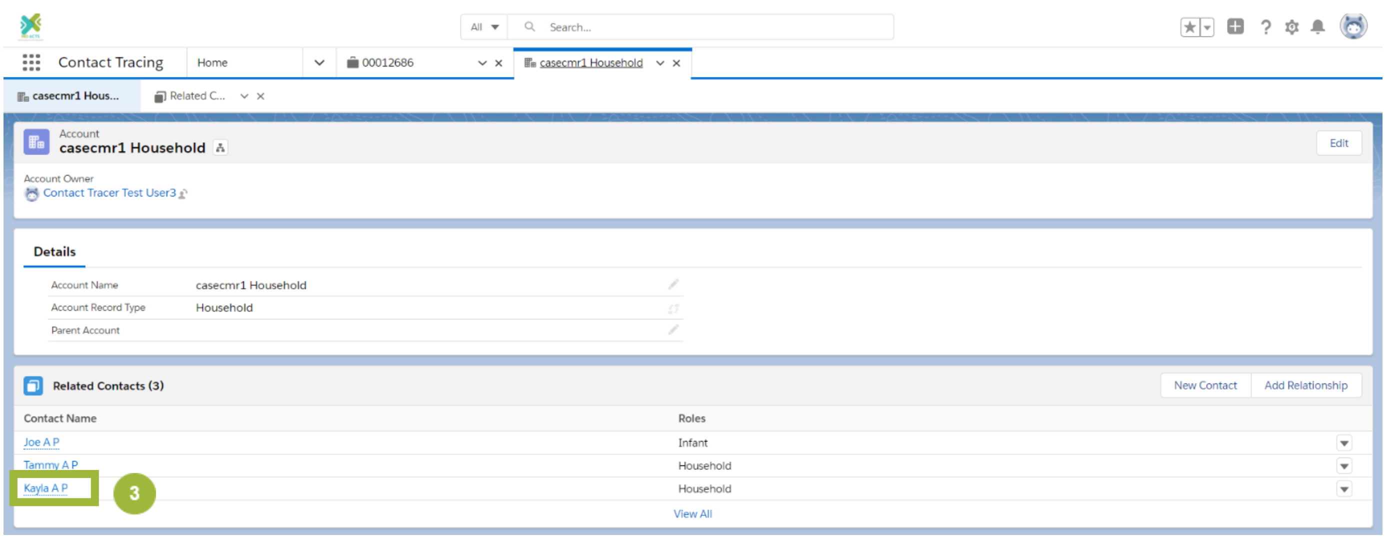


To see additional details regarding a contact's household information, continue with these optional steps:

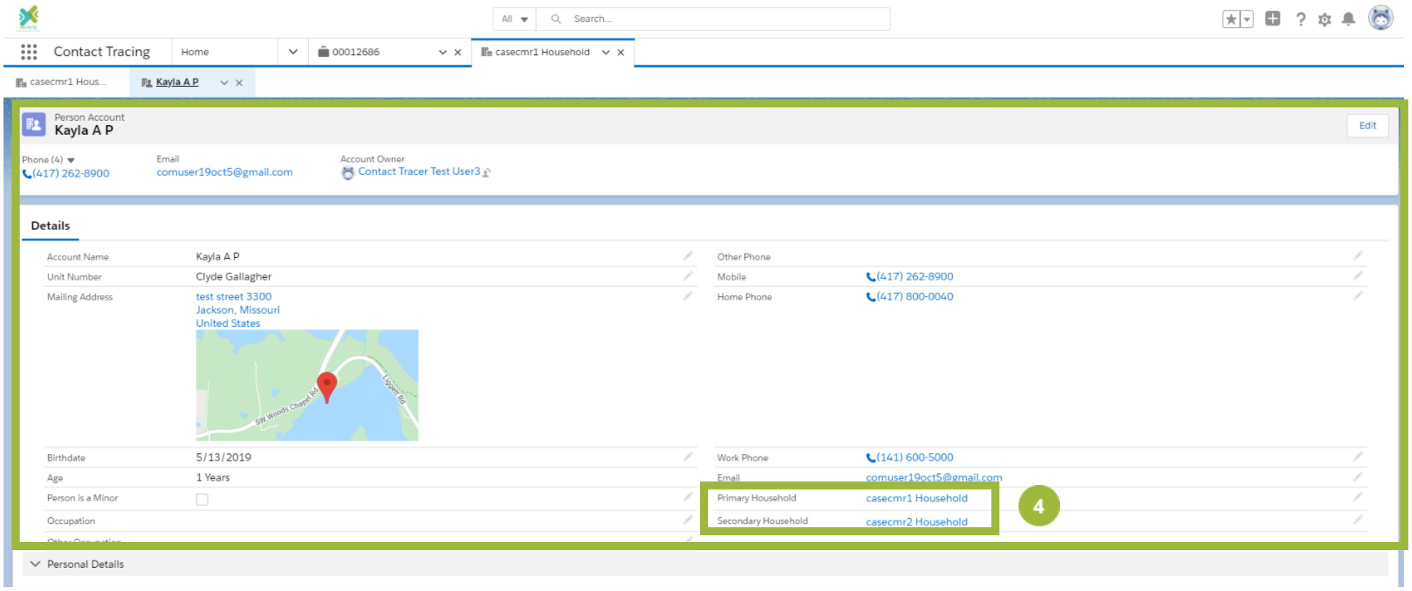
2. Click into the household record to open a new tab, titled [CaseCMR] Household, and view all of the contacts associated with it.



3. The new tab will display. Click into any household member's name to display their Person Account.



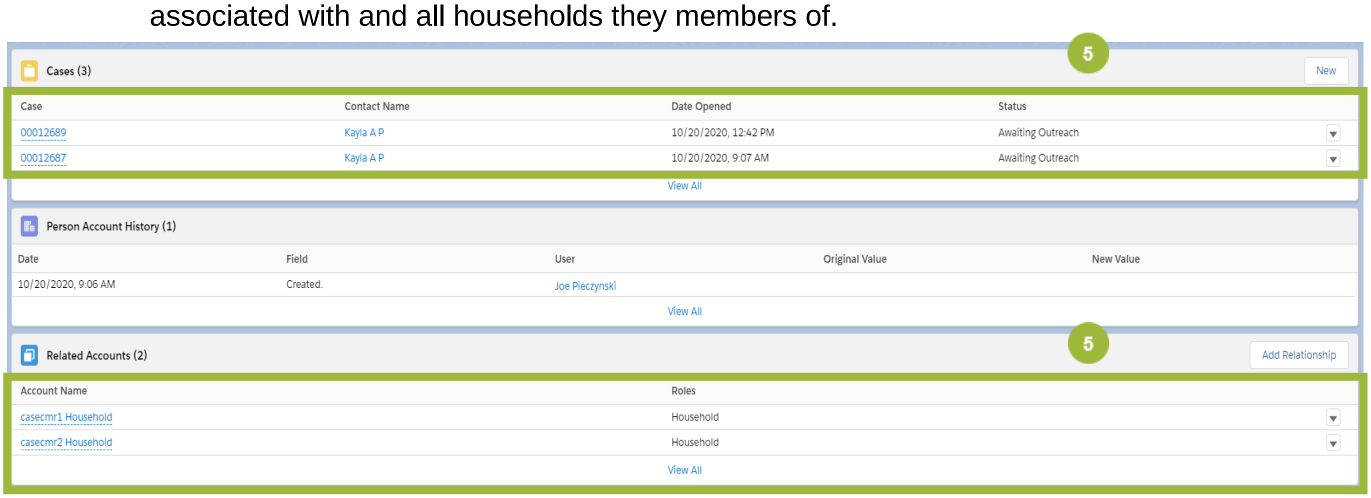
4. The Person Account details will display. Here you can see additional details about the contact, including if they are part of a secondary household.



If a contact is a member of a secondary household, this means that they are not only part of the primary household but are also part of a second household living with potentially more contacts to COVID-19 cases. These are based on EpiTrax Case CMR Numbers.

The primary household represents the first exposure event. The secondary household represents a secondary exposure event occurring after the first.

5. Scroll down further on the Person Account Details page to see all cases this contact is associated with and all households they members of.



NOTE: If a contact tracer needs to re-assign ownership of a case to a county not in their jurisdiction, they will need to reassign ownership of each household contact case individually. It's important to keep in mind that once a household member is transferred outside of the contact tracer's jurisdiction, the contact tracer will no longer have permission to view that individuals case record or the household record of other members of the household remaining in the contact tracer's jurisdiction.

MO ACTS System UI Enhancements

In this section you'll learn about new user interface enhancements in MO ACTS.

MO ACTS Picklist Enhancements

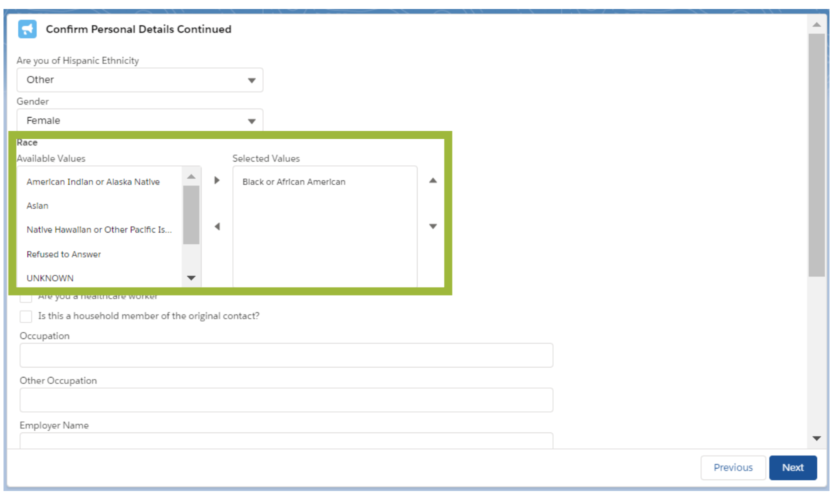
Picklists have been updated to be more user friendly and easier to navigate throughout the guided call script and on the contact details page.

Multi-select Race Picklist

A new multi-select race picklist has been added to the contact details and guided script (in the Confirm Personal Details section) so that multiple races can be chosen as options when a contact tracer fills out case information from the contact. This field will initially populate with data from EpiTrax and can be edited.

When editing this field, you can now select from the **Available Race** list by holding down CTRL + clicking, then click the right arrow to add an option to the **Chosen Race** list.

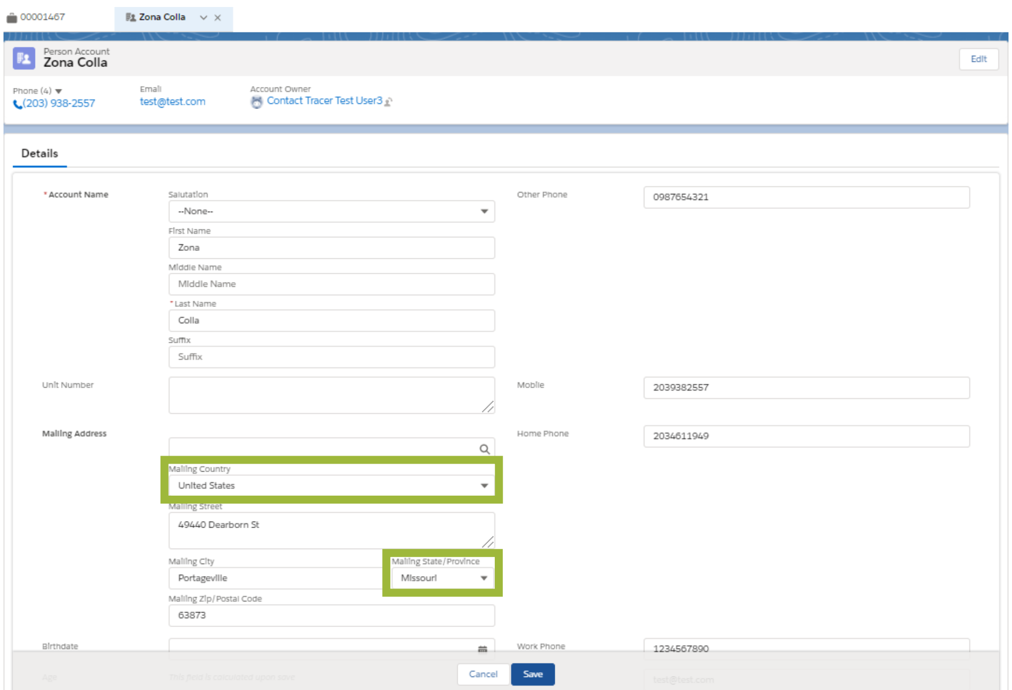
Guided Script:



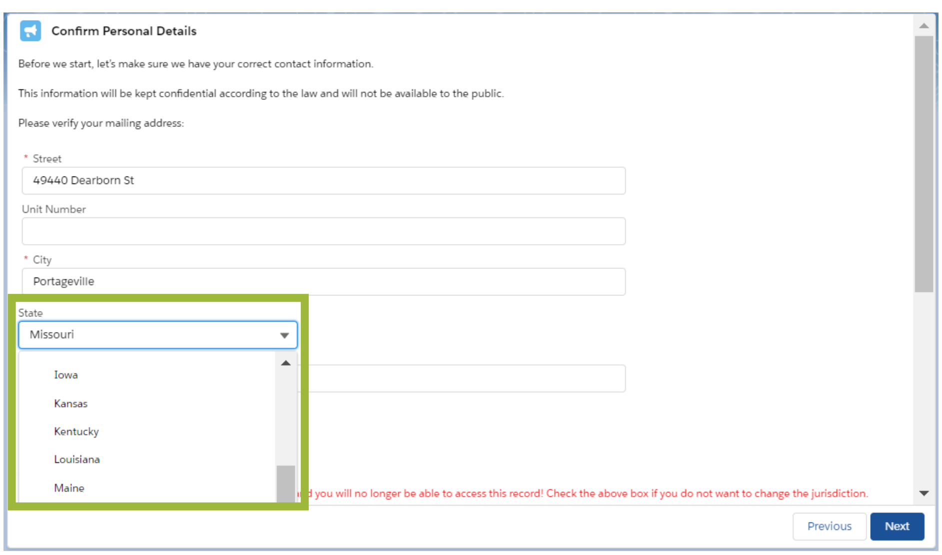
State and Country Picklist

A new state and country picklist has been added to the guided script and the contact details. Previously a contact tracer would type the state or country, but now you are able to select from a drop down.

Contact Details:



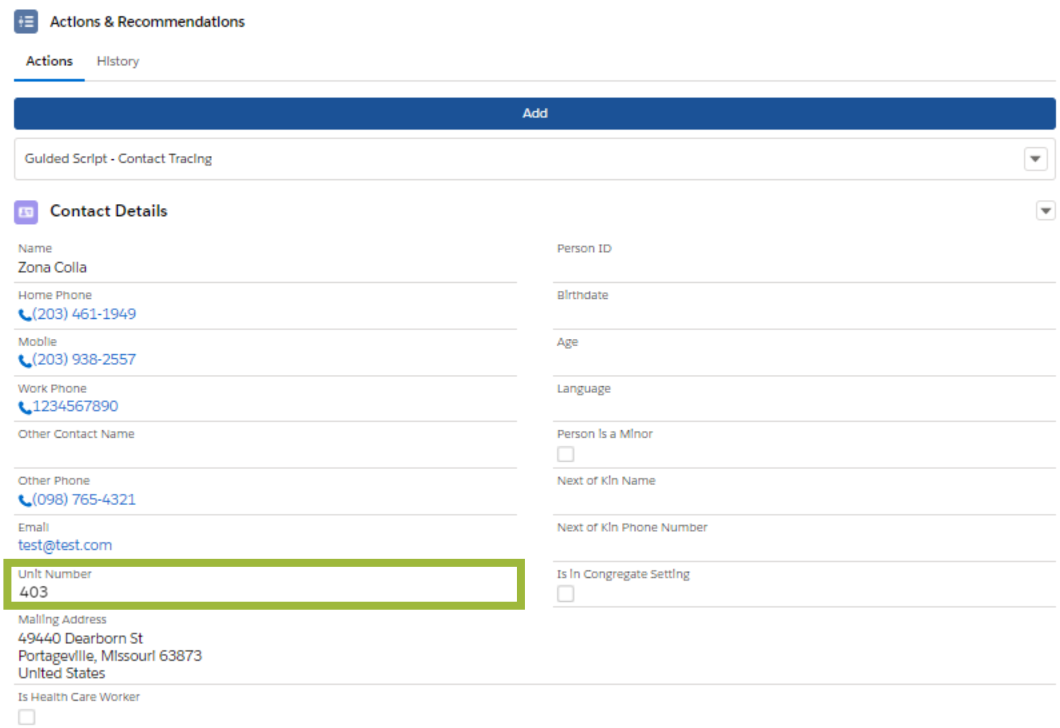
Guided Script:



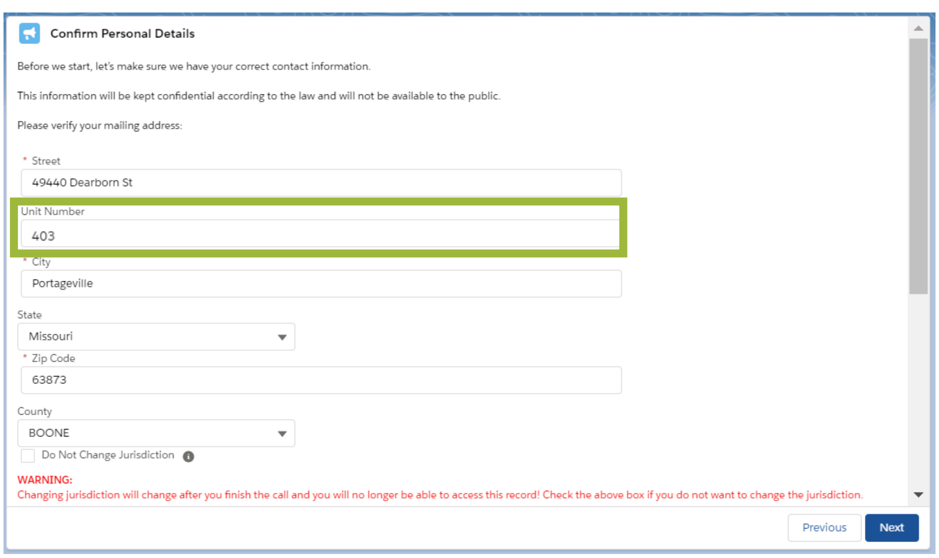
MO ACTS New Unit Field

A new field for Unit Number for the contact's address has been added to the contact details and the guided script to separate this address line detail.

Contact Details:



Guided Script:



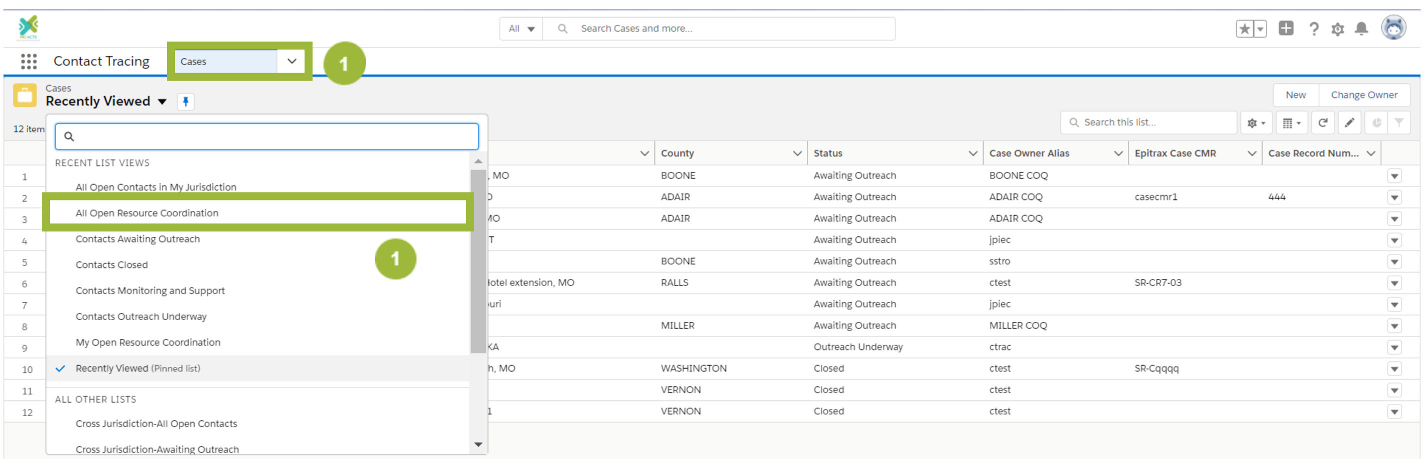
MO ACTS Resource Coordination

In this section you will learn about new functionality around resource coordination in MO ACTS. After a contact tracer has conducted outreach to a Contact to a COVID-19 case and confirmed they require additional resources like food, support for chronic medical conditions, or specific household items during quarantine, the contact tracer will mark the contact to be referred to a resource coordinator. Now a resource coordinator can be assigned to the contact's case to begin follow-up. You will see how to view all contacts requiring resource coordination, assign a resource coordinator to a case, and then how to view cases assigned to you for resource coordination.

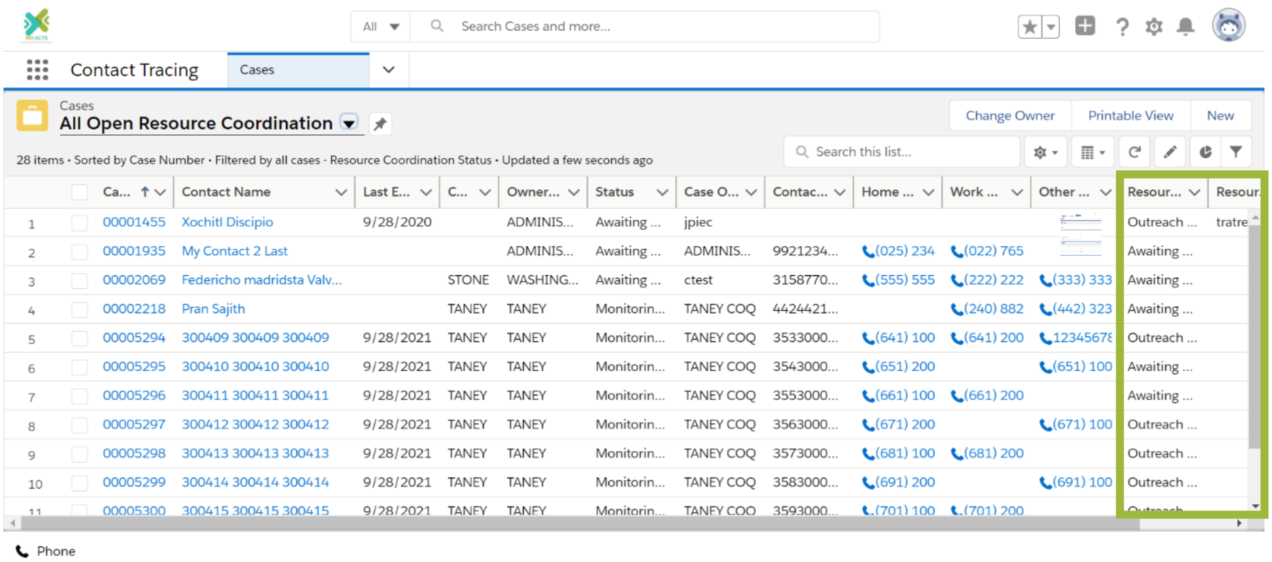
Resource coordinators will manage all records that need resource coordination for contacts during quarantine. They may be the same person who is doing contact tracing activities or they may be a different person, either way, the resource coordinator role has the same permissions in MO ACTS as a contact tracer.

How to View All Contacts Requiring Resource Coordination

1. Navigate to the Cases Tab and use the drop down to select All Open Resource Coordination List View to view all of the contacts that require resource coordination.

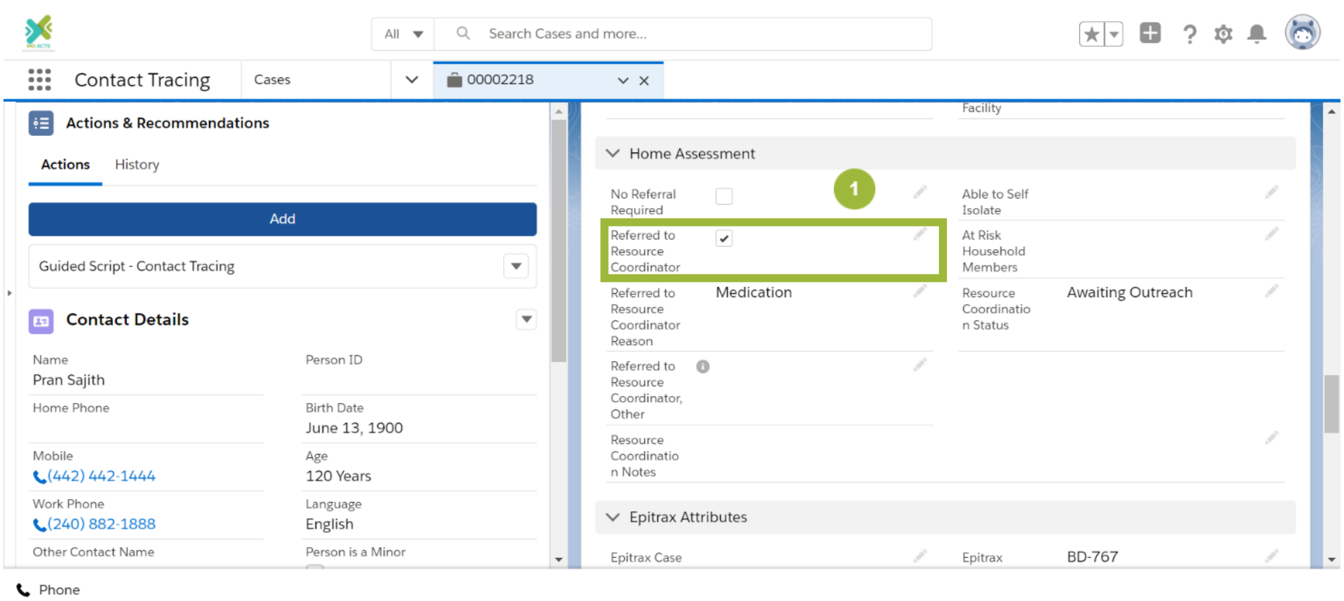


2. The All Open Resource Coordination List View will display; please note that there are columns for resource coordination status and notes that can help you identify contacts requiring resource coordination. This list view is automatically filtered to display cases that have Awaiting Outreach or Outreach Underway as the resource coordination status.

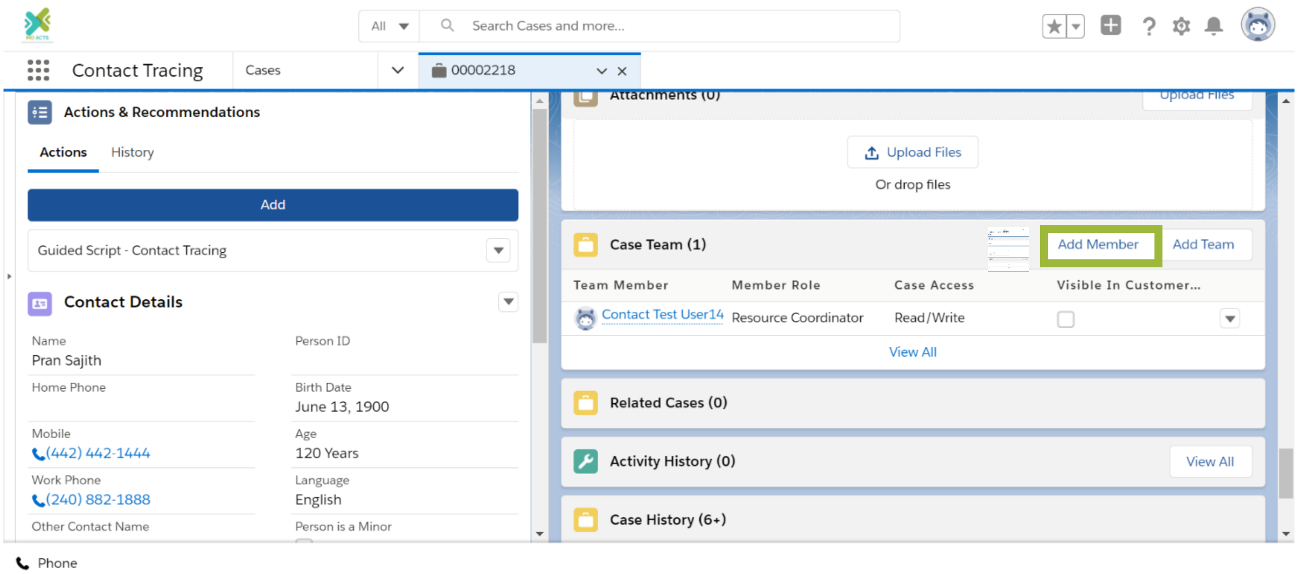


How to Assign a Resource Coordinator to a Case

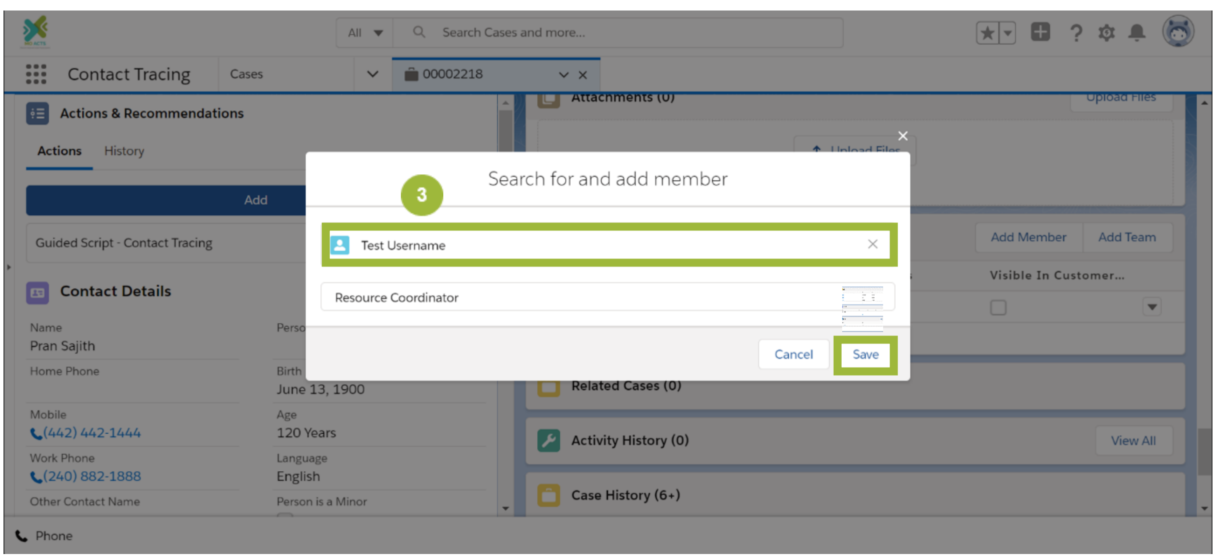
1. When you have opened a case, navigate to the Home Assessment section. You'll notice that the checkbox field 'Referred to Resource Coordinator' is already checked. A Contact Tracer will check this box during their outreach call with a contact to COVID-19 case if they require additional resources or support during quarantine.



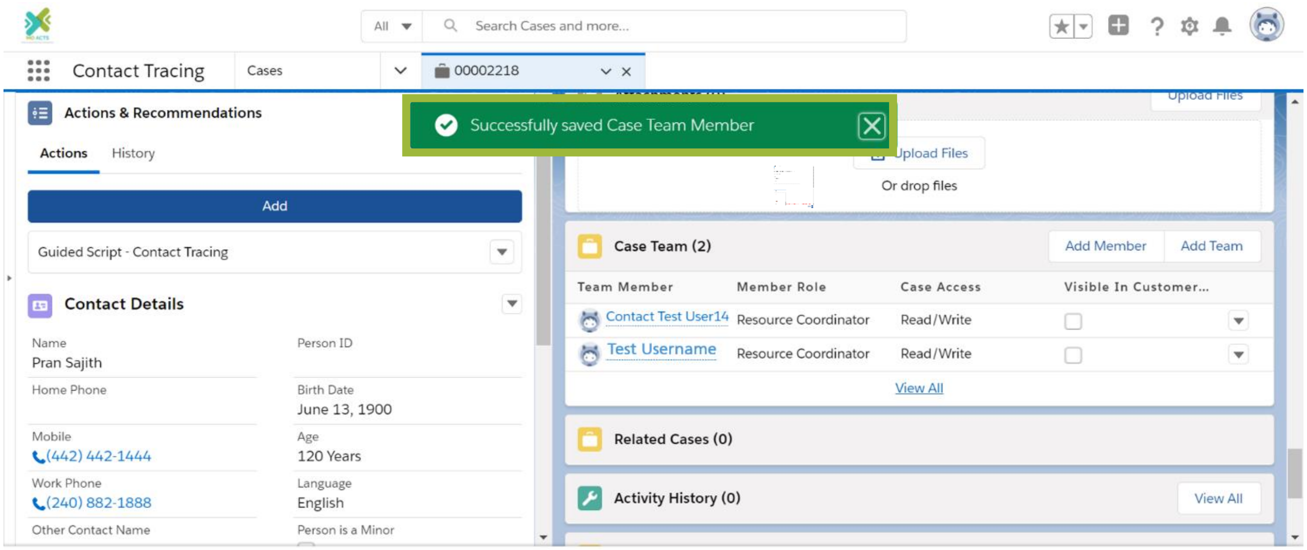
2. To assign yourself or someone else as a Resource Coordinator scroll to the Case Team Section and select Add Member.



3. Type in the name of the resource coordinator you would like to own the case and then select that individual. Ensure you search using People to assign a MO ACTS user to the case; do NOT set a Contact to a COVID-19 Case as a team member.
4. Click **Save**

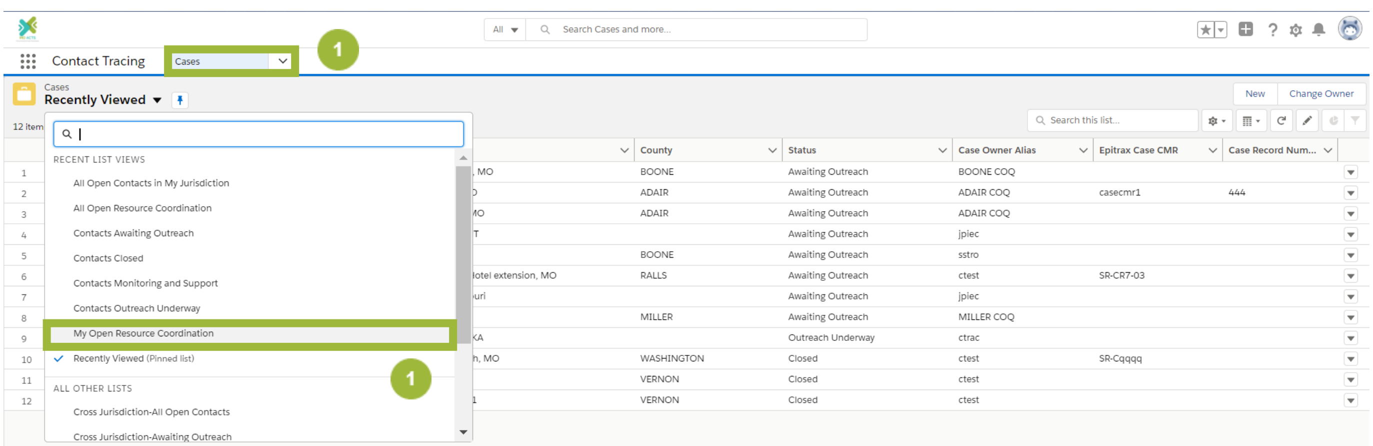


5. A notification will appear saying you have successfully added a case team member.

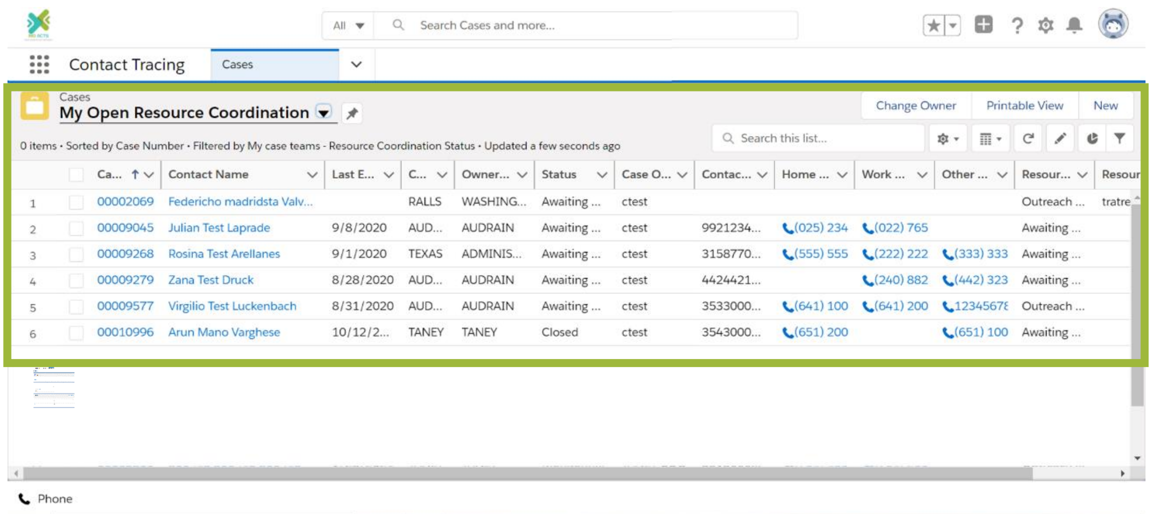


How to View All Cases Assigned to Yourself as a Resource Coordinator

1. Navigate to the My Resource Coordination list view using the drop down. This list view is automatically filtered to display cases that have Awaiting Outreach or Outreach Underway as the resource coordination status.



2. The My Open Resource Coordination queue will display. As the resource coordinator continues to work with the Contact to COVID-19 case they can progress the case's resources status as needed.



NOTE: Updating the status for resource coordination will not change the Contact to Covid-19 case status but rather will be a way for a resource coordinator to keep track of their work.

MO ACTS Amazon Connect Updates

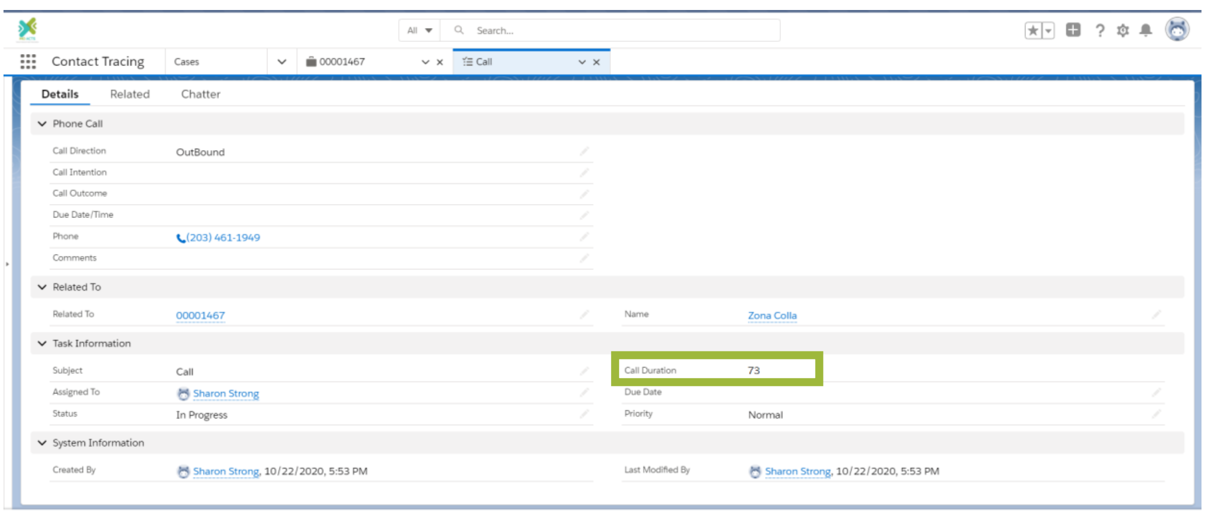
In this section you will learn about additional features and functionality that have been added to the Amazon Connect phone system within MO ACTS.

No Outbound Calls Outside of the US

MO ACTS users are now restricted from calling anywhere outside of the United States, Puerto Rico, and the US Virgin Islands.

Call Duration is Captured

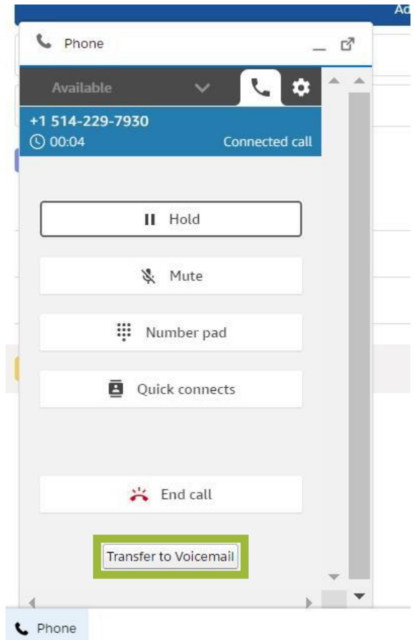
During the contact outreach process, MO ACTS automatically creates a task for every outbound call after the call is disconnected. Now, when a contact tracer ends a call, the duration of the call will be automatically logged. This metric can be useful to report information regarding calls using the reporting functionality in MO ACTS. To learn more about reporting, visit the Supervisor Guide.



Leave an Automated Voicemail

During the contact outreach process, contact tracers can leave a pre-recorded voicemail for the Contact to COVID-19 case. The Amazon Connect Softphone features a new “Transfer to Voicemail” button, as shown below. When you reach the contact’s voicemail, click this button to leave the pre-recorded voicemail. Please note that the automated voicemail message is only in English.

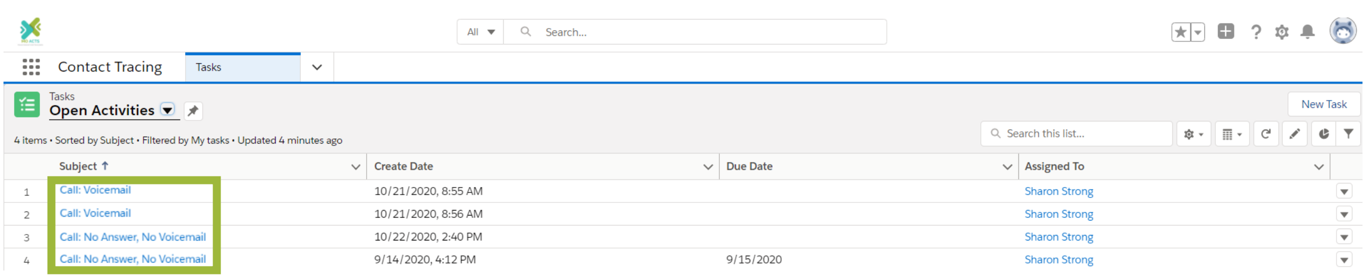
The complete voicemail message is as follows: Hello, I am calling from Department of Health for State of Missouri working with the Contact Tracing Collaborative. We are following up with you and will call you back soon. You are also welcome to call us back on +1 (573)7511656.



Differentiating Missed Calls with and without Voicemails

In order to differentiate Missed Calls with and without voicemails, MO ACTS will automatically set the subject of missed call tasks to clearly state if a voicemail was left by the caller or not. A contact tracer can navigate to the Tasks Tab and view any list view to see missed call tasks listed.

If a voicemail was left, the call task subject will be set to "Call: Voicemail." If there is no voicemail, the call task subject will be set to "Call: No Answer, No Voicemail."



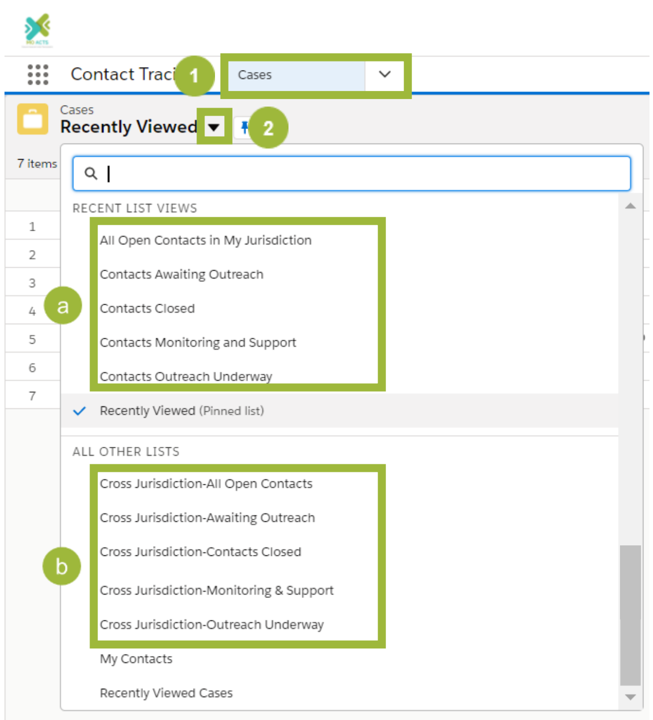
MO ACTS Jurisdictional Ad-Hoc Access

In this section, you will learn how users from jurisdictions with data sharing agreements will now have the ability to see multiple jurisdiction groups and see Contact to COVID-19 case records for each jurisdiction group in which they are assigned.

Contact Tracers will be able to view their primary jurisdiction in a list view as well as view additional secondary jurisdictions they're assigned to in separate list views.

To navigate to the various list views, follow these steps:

1. From the **Home screen**, navigate to the **Cases tab**
2. Click the drop-down arrow. You will now see List View options. This is where you will be able to view your Primary and Cross jurisdiction lists views
    a. Your **Primary Jurisdiction** list view will show you all open contacts in your Primary jurisdiction lists include:
        i. All Open Contacts in My Jurisdiction
        ii. Contacts Awaiting Outreach
        iii. Contacts Outreach Underway
        iv. Contacts Monitoring and Support
        v. Contacts Closed
    b. List views that start with **Cross Jurisdiction** will show you all open contacts in ***all*** of the jurisdictions in which you're assigned, Primary and Secondary.



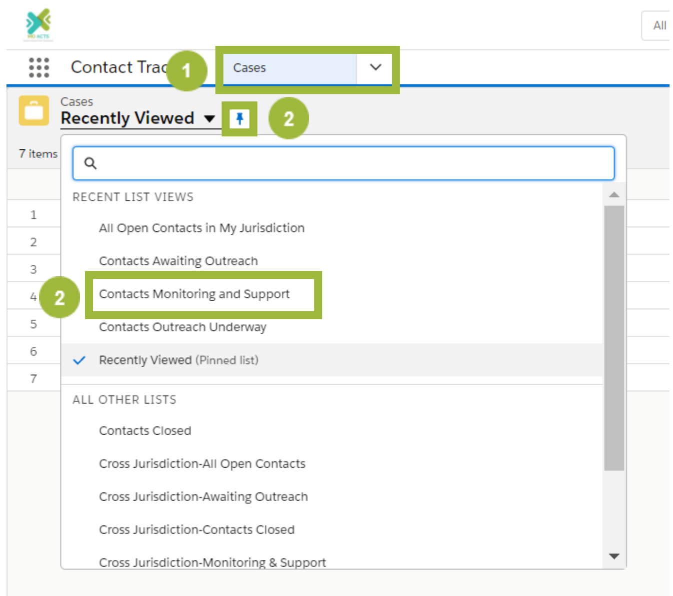
MO ACTS Bulk Contact Case Actions

Closing Cases in Bulk

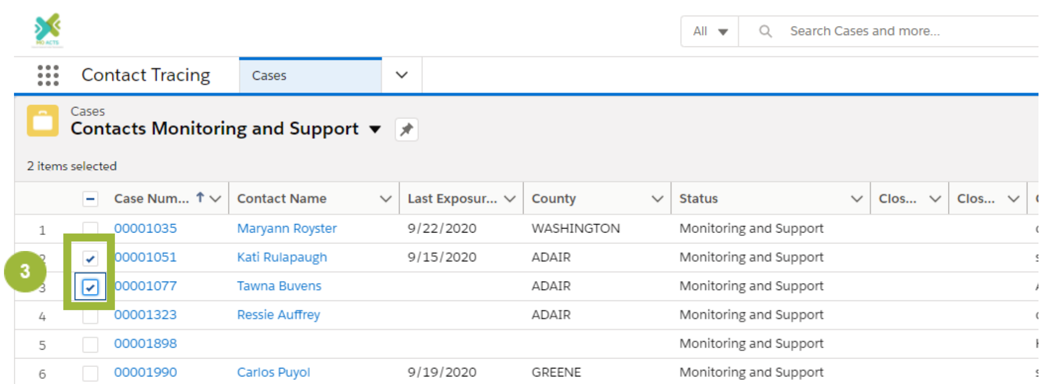
Contact Tracers now have the ability to close cases in bulk. This new functionality allows for you to close up to 200 cases at a time.

Below are the steps to close a case in bulk.

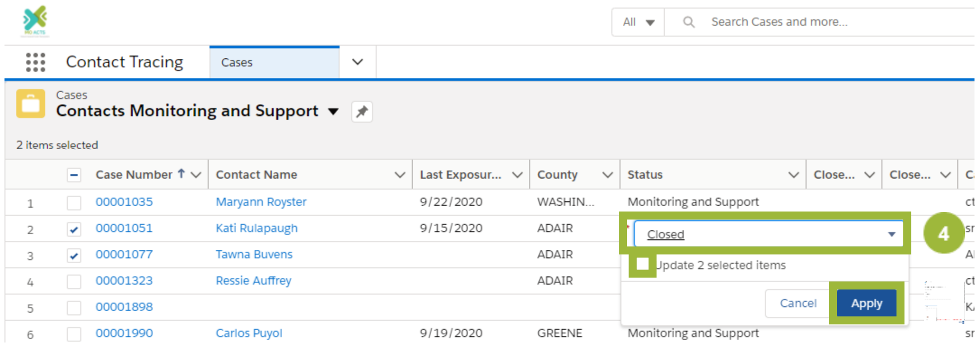
1. From the home screen, navigate to the **Cases tab**.
2. From the cases tab, click the drop-down arrow and select an appropriate queue (e.g. Monitoring and Support)**.**



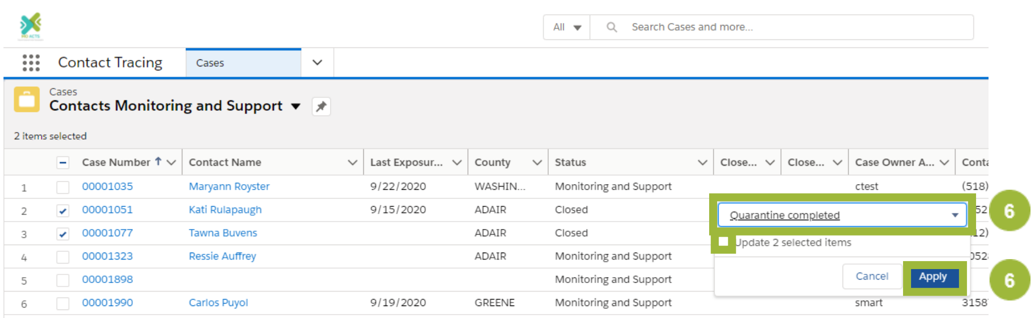
3. Now, you will see all the cases you own that are in the monitoring phase. Select the cases you wish to close by clicking to the left of the case number in the checkbox.



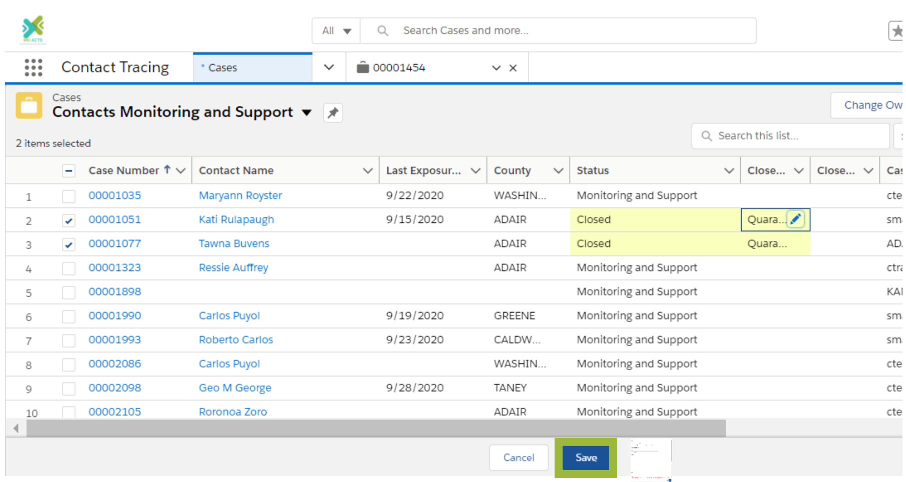
4. Next, under **Status** update a case to **Closed** from the dropdown, then click the checkbox for **Update selected items** to mass update every selected case status to 'Closed.'
5. Click **Apply**.



6. Lastly, choose the **Closed Reason**. Contact Tracers have the option to choose individual Closed Reasons or, similar to Step 4, you can select the checkbox to mass update the selected items with the same Closed Reason. Click **Apply**.



7. Once all your changes are complete, click **Save**. Now, all the cases you just closed will be in the **Contacts Closed List View**.



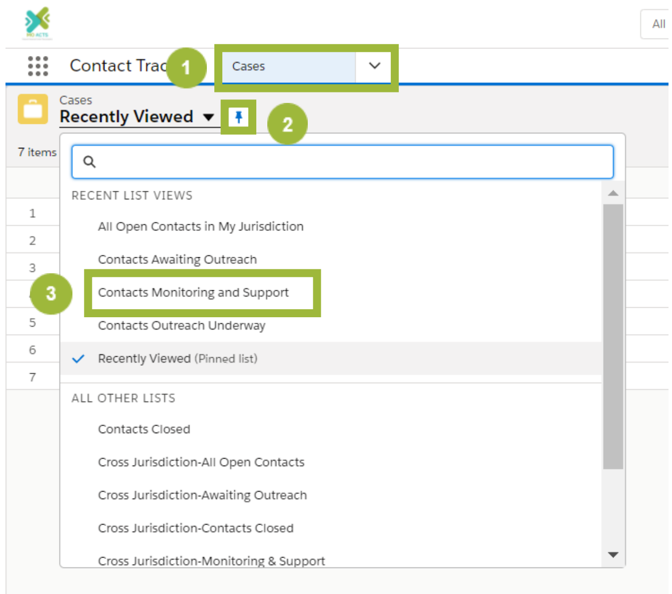
Reassigning Cases in Bulk

Contact Tracers can now mass reassign Contact to COVID-19 cases. This will allow a contact tracer to reassign their contact cases to someone else, a supervisor to assign contact cases to individual contact tracers, or a contact tracer to reassign contact cases to a different jurisdiction's queue. This functionality allows you to reassign up to 200 cases at a time.

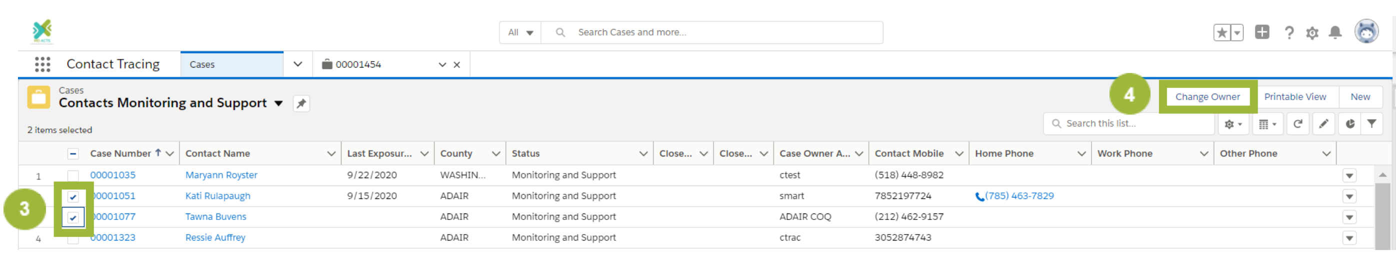
NOTE: If a user is actively in the Contact to COVID-19 Case record making updates and their case is reassigned before they save their changes, they will no longer have access to the case and they will get an error message when they try to save their changes.

Below are the steps to reassign a case in bulk.

1. From the home screen, navigate to the **Cases tab**.
2. From the **Cases tab**, click the drop-down arrow and select an appropriate list view (e.g. Monitoring and Support).

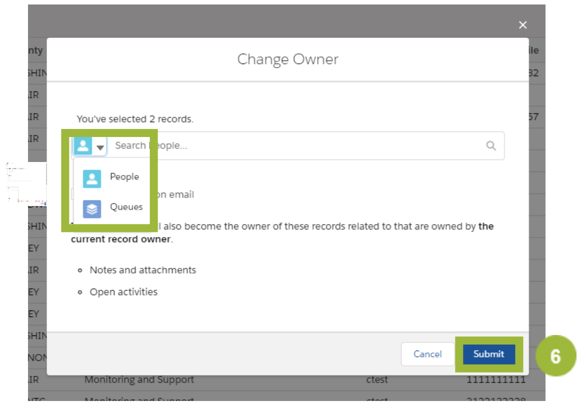


3. Once the list view opens, select the cases you wish to reassign by clicking to the left of the case number in the checkbox.
4. Click the **Change Owner** button.



5. You can now either choose to select a **Queue (jurisdiction)** or a **Person** to reassign the case to.

6. Click **Submit**.



MO ACTS Case, Contact, and Account Page Layouts

On the **Case Record**, **Contact Record**, and **Account Record**, the page layouts have been reordered for clarity so that the fields read more intuitively.

After analysis, it was found that the Congregate Setting fields were the least used and thus were removed from the **Case Page** layout. However, this setting can still be found on the left-hand pane checkbox field, **Congregate Setting**.

For your awareness, the CDC identifies a congregate setting as "shared housing [that] includes a broad range of settings, such as apartments, condominiums, student or faculty housing, national and state park staff housing, transitional housing, and domestic violence and abuse shelters. People living and working in this type of housing may have challenges with social distancing to prevent the spread of COVID-19."

Additionally, in the Monitoring section where Contact Tracers can see related cases to the contact, the fields have been re-ordered for clarity as well.

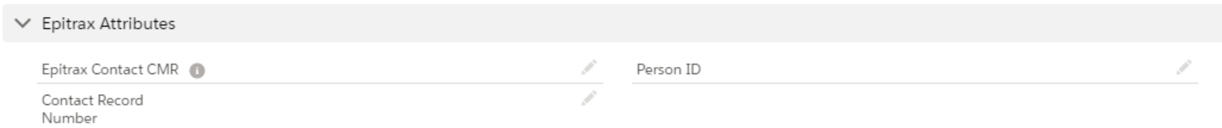
MO ACTS Route to Queue based on the EpiTrax Investigating Agency

Typically, Contact to COVID-19 cases are routed to MO ACTS based on the county field in EpiTrax. Going forward, if there is no county populated in EpiTrax, the contact case will route based on the investigating agency of the original positive or probable COVID-19 case in order to assign the contact to the appropriate jurisdictions queue.

Routing logic for this functionality assumes that the investigating agency will never be null. Additionally, multiple agencies can map to one queue/county. If the queue/jurisdiction does not have any MO ACTS users (e.g. the jurisdiction has not yet started using MO ACTS), the ownership of the contact will be routed to an Administration queue (DHSS surge support).

MO ACTS Additional EpiTrax Attributes

Contact Tracers can now see additional EpiTrax attributes within MO ACTS, including the Contact Record Number and the Case Record Number. These will allow Contact Tracers who are also Case Investigators to search using these identifiers in EpiTrax. For example, if a Contact to a COVID-19 case developed symptoms, they can be searched for in EpiTrax using the Contact Record Number and case investigation can begin.



Key Terms:

EpiTrax Contact CMR: This field is what links together EpiTrax and MO ACTS cases. For EpiTrax users, this is the identifier (record number) for the morbidity event (CMR numbers are auto generated IDs in EpiTrax).

Contact Record Number: This is the field that MO ACTS users can use to search back within EpiTrax to track information about the EpiTrax case or event.

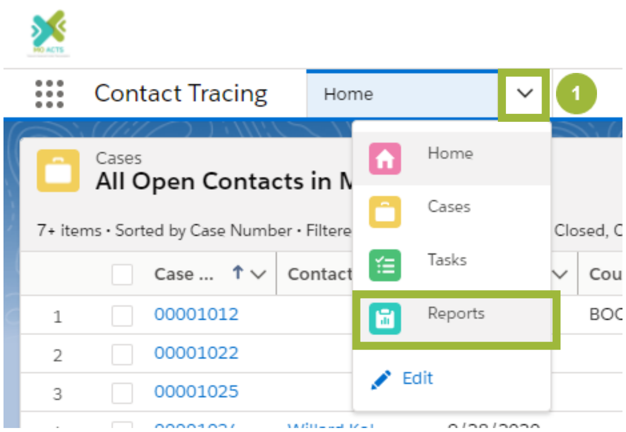
Person ID: This is an individually assigned identifier in EpiTrax for the contact.

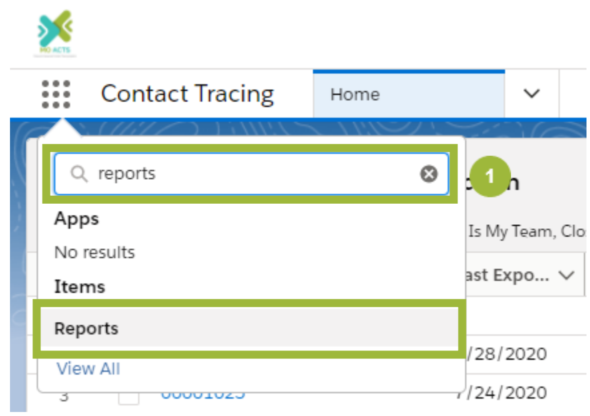
MO ACTS Reporting: Export Data as an LPHA User

In addition to established reporting functionality within MO ACTS, Contact Tracers can now export data so that they can work with the selected reports outside of the MO ACTS platform.

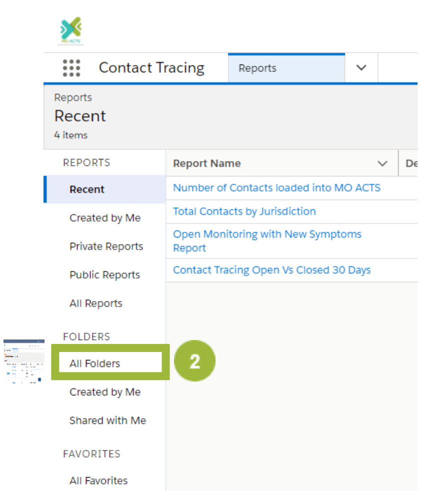
Below are the steps to access reports and export data.

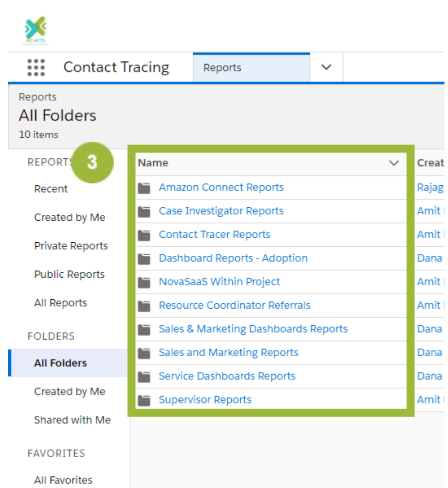
1. First, there are two ways to navigate to the **Reports tab**. From the Home screen, you can either click into the drop down where you can add Reports as quick link if it is not displayed, or you can use the waffle icon and search for reports from there. Click **Reports.**

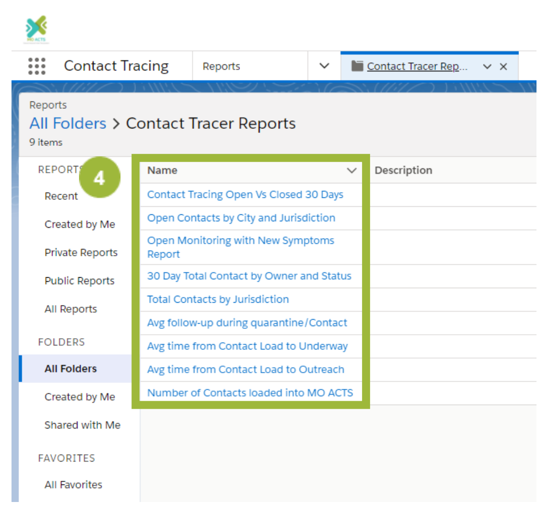




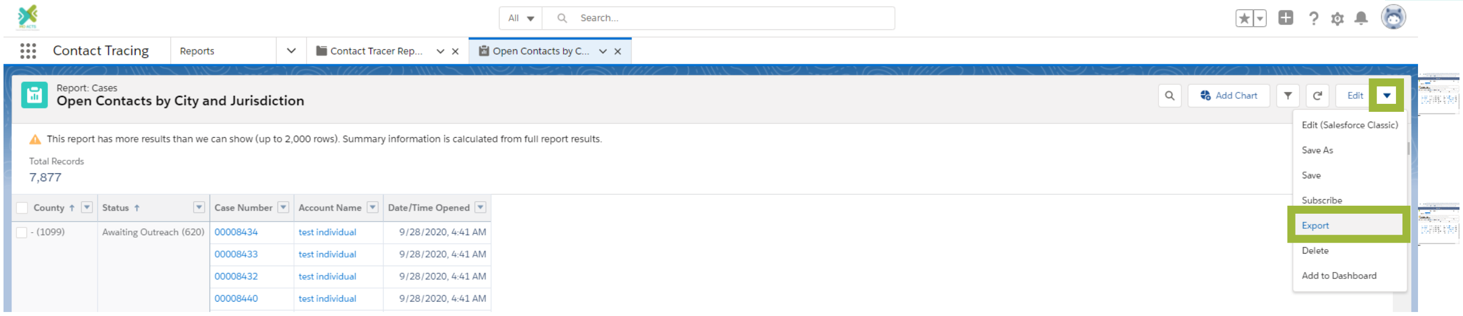
2. Once in **Reports**, click **All Folders** to view the various folders of each report.
3. Next, select the folder containing the report. The **Contact Tracer Reports** folder has standard reports available to view and export.
4. Then, select the report you want to view.



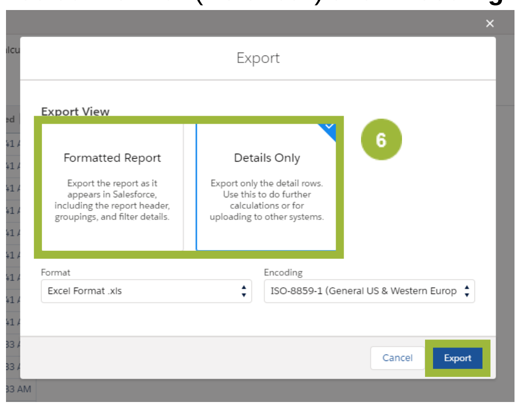




5. Once the report is open, click export from the dropdown.



6. You will be presented with two options for the **Export View**. The **Formatted Report** will export the file as it appears in MO ACTS and the **Details Only Report** exports the detailed rows. You will want to choose **Details Only** if you plan to manipulate the data once exported or upload it to other systems. Then select **Format** (xls or csv) and **Encoding**.



7. Now, the report will download in your internet browser. Click the file and it will open.